

No Time to Die:
Analysing and Historically Framing the Impact of
Digital, Streaming and the Coronavirus Pandemic on
UK Cinema Exhibition and Distribution

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Abstract

The sudden emergence of the Coronavirus pandemic in early 2020 significantly impacted the film industry, by shutting down productions and leading to the closure of cinemas globally. Whilst this moment allowed for studios to experiment with new release methods and strategies, such as streaming and premium video-on-demand rentals, has the situation that the industry found itself in as a result of the pandemic been completely new and unpredictable, or instead, the syntheses of multiple significant movements and developments that have occurred within cinema's history?

My thesis examines the impact of Coronavirus on the British exhibition and distribution industries as the situation unfolded through the historical framework and understanding of key moments that have occurred since the last time the film industry was impacted as a result of a global pandemic. My research explores the 1918 Influenza, key technological developments, including the transition from celluloid to digital and the advent of streaming, business models like the theatrical window, as well as evolving social habits, economic decisions, and industry discourses that have shaped the industry at the moment of the next pandemic's emergence in 2020.

This thesis is split into two sections, with the first being historical and the second focussing upon the pandemic itself. Section 1 presents a critical analysis of key moments from cinema's history, using a range of academic sources to frame a historical understanding of previous industry shifts and the responses to them. Section 2 uses a combination of online sources and a remediation of cinema's past to construct an analysis of the unfolding situation surrounding the pandemic. This provides a pivotal understanding of a significant moment in the film industry's recent history, that not only appreciates the important developments that have occurred in cinema's past, but at the same time, offers a unique insight into what it means for the future of the industry.

Has the Coronavirus pandemic provided a moment for significant industry change, or has it simply accelerated processes and developments that were already occurring?

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Finally, given the nature of the research topic, I wish to acknowledge all of the lives that have unfortunately and sadly been lost and affected as a result of the Coronavirus pandemic.

Introduction

The purpose of this project is to analyse the situation within the British exhibition and distribution industries surrounding the emergence of the Coronavirus pandemic and its impact. The aim is to understand if Coronavirus created an opportunity for change to occur within the film industry, or whether it has simply accelerated the developments and processes that were already set to occur. The scope of this project is from the initial postponement of the release of *No Time to Die* in March 2020 until its eventual release in September 2021. Using Oliver Grau's concept of Media Art History, this thesis uses a historical framework of cinemas past to examine the developments occurring within the contemporary industry and understand which aspects are new, and which are inherited. To do this, the thesis will frame the Covid crisis within the context of a historical observation of key moments in cinema's history, the starting point for which is the last time that the industry was impacted by a global health pandemic with Influenza in 1918.

At the core of this thesis are the following research questions. The first is how has the relationship between studios and movie theatre owners shifted throughout various technical introductions and additional methods of movie watching, and how has the pandemic impacted it? How have audiences responded to movie-watching with new technical formats in the cinema that enhance the movie-going experience, in comparison to the convenience that the introduction of streaming services has offered home viewing? Finally, how have viewing habits changed when the 2020 pandemic brought a closure to cinemas for the first time in cinema's history when there were other ways for audiences to watch films outside of the movie theatre?

This thesis is divided into two sections. Section 1 explores the pre-pandemic film industry, which covers a range of key moments and developments that have occurred in cinema's history and established where the industry was at the moment that the Coronavirus pandemic emerged. Section 2 follows the pandemic as it unfolded, analysing the key decisions in response to the virus and the new situation that the industry found themselves in.

On January 14th, 2020, it was announced that the 18-year-old musician Billie Eilish would perform the theme song for the 25th instalment in the James Bond franchise, *No Time to Die*, which was set to be released on April 2nd, 2020, in the UK, and April 10th globally (Strauss, 2020). This made Eilish the youngest person to ever perform a James Bond theme song when it debuted on February 13th, 2020, which was six weeks ahead of the film's release. However, a few days earlier, on February 9th, Eilish attended the 92nd annual Academy Awards with her brother and collaborator Finneas, where they performed a cover of the Beatles song "Yesterday" as a part of the In Memoriam segment (Vanderhoof, 2020). The ceremony itself made history as the South Korean film *Parasite* (2019), Joon-

ho) became the first title not in the English language to win the Oscar for Best Picture, but throughout the night there was much focus on Eilish and her brother. This ranged from reports that they would debut the Bond song early to speculations that Eilish would be the first person born after the year 2000 to win an Oscar at the following year's ceremony, as previous Bond theme song artists, such as Adele for *Skyfall* (2012, Mendes, UK) and Sam Smith for *Spectre* (2015, Mendes, UK), also won Academy awards for their performances (Mercuri, 2020). Eilish eventually did follow this trend and was awarded the Oscar for Best Original Song for *No Time to Die*, becoming the first person born in the 21st century to win any Academy Award. However, this did not occur at the following ceremony in 2021, as initially anticipated.

On March 4th, 2020, just over two weeks after debuting the theme song for *No Time to Die*, MGM, the film's studio, and Universal, the distributor, made the decision to push back the film to November, due to concerns and fears over the growing number of cases of Coronavirus around the world and in international markets (Lee, 2020). Coronavirus, or Covid-19, is an infectious disease that emerged in Wuhan, China on December 31st, 2019, and could be spread from an infected person's mouth via small liquid particles when they cough, sneeze, speak or breathe. Covid was medically titled Sars-CoV-2, and a different strain of the virus, Sars, was previously detected in China in 2002 and resulted in over 8,000 cases and 774 deaths by July 2003 (Pasley, 2020). Coronavirus had an increased risk of transmission compared to the earlier strain, and on January 30th, 2020, the World Health Organisation declared it a public health emergency (Boseley, 2020). Between January and early March, which coincided with the 2020 awards season, there was limited testing and surveillance, which meant that the virus started as reports in China, then spread to cases in other countries, which then continued to grow and increase across the world. In these months, caution grew among the public, and was even noted in the awards season, as filmmakers and Oscar nominees Bong Joon-ho and Taika Waititi were photographed wearing face masks at the airport, while travelling between the BAFTAs and Oscars in February 2020, to protect themselves from the risk of transmission. It was only on March 11th that the World Health Organisation declared Coronavirus as a global pandemic, which was one week after the postponement of *No Time to Die*. Coronavirus significantly impacted the entire world, from stay-at-home orders to the standstills of global industries, including the film industry. Moreover, it also resulted in a significant loss of life with just under seven million deaths in its first three years, as well as attributed to issues of mental health and loneliness in society. As the events unfolded following the declaration of a global pandemic, it forced world leaders to act swiftly, companies to think carefully, and the general public to remain cautious. It was around this time that my own journey towards my thesis also began, and even that would be impacted as a result of the pandemic.

My first proposal towards my PhD research was written in October 2019, and focussed on the year 2020 for cinema, as before Coronavirus emerged as a pandemic, I believed it was projected to be a significant and impactful year for the film industry that would bring a culmination to multiple industry talking points and discourse that had been prominent in the prior years, such as cinema versus streaming, and independent films in a blockbuster saturated market. I intended to document the year as it happened, taking note of specific key moments scheduled to occur throughout the year. This included the launch of Disney+ in the United Kingdom in March 2020 as the first studio-owned streaming service, as well as the performance of blockbusters at the box office, as at the start of 2020, 31 of the 38 films to gross over £50 million in the UK belonged to an established series. In addition, December 2020 was also the initial release date for the sequel to 2009's *Avatar* (Cameron, USA), now known as *Avatar: The Way of Water* (2022, Cameron, USA), and as the original movie broke box-office records and popularised different methods of watching films, including 3D, I planned to observe how its sequel would perform in an industry that I anticipated would be saturated with streaming, franchises and cinematic universes, such as the MCU (Marvel Cinematic Universe). While I expected to use the first *Avatar* as one of the key films and moments that helped to define the modern industry, as well as further examination of the transition to digital from celluloid, home media markets and the advent of streaming.

This would all change. In March 2020, I discovered that the year would be even more significant and impactful than I could have ever imagined.

Since Coronavirus was declared a pandemic and resulted in national lockdowns, it also significantly impacted the film industry. The UK Cinema Association reported that admission figures for 2020 were down 75% from 2019, whereas total revenues for the year were also down 76%, due to the closure of movie theatres for eight of the following eleven months (UKCA, 2021). Film production was also completely shut down between March and May 2020 in the UK, and only allowed to resume within strict guidelines, protocols, and social-distancing measures (Dalton, 2020). Furthermore, there was also the delaying and postponement of several films, of which *No Time to Die* was the first. *No Time to Die* was eventually released in late September 2021, around 18 months later than it was first expected. This meant that Billie Eilish would not be nominated or win her Oscar for the Bond theme song in 2021, but instead in 2022, thus demonstrating the uncertainty that the pandemic brought. Whilst Covid affected films and productions, it also impacted the lives of many film professionals, as 51% of workers in the UK arts and entertainment industries were furloughed, which led to an extreme state of precarity across the industry, with those unsure when their work might resume or to what capacity (Heaphy, 2020). It was the first time since the 1918 Influenza pandemic and the two World Wars that the film industry had been impacted and disrupted to such an extent, but what made the

Coronavirus standstill even more significant is that it was also the first time that such an event had occurred when there have been other ways to watch a movie outside of the cinema.

In the century since the flu epidemic and the emergence of the 2020 pandemic, there have been movements and negotiations between movie theatres and home viewing. The introduction of the television provided audiences with a new market to watch movies, through the use of programmers. Television grew in popularity as a viewing format, and became a common practice in homes, as 75% of British homes had a TV in the 1960s, which increased to 97.5% by 1980 (BARB, 2019). Alongside television was the arrival of home media formats, with VHS and Laserdisc in the 1970s before DVD and Blu-Ray in the late 1990s and 2000s, respectively. These formats provided an additional market for movie-watching at home beyond television programmers and granted audiences the freedom to choose what to watch and when. As a result, exhibition business models, such as the theatrical window, were established to protect the preferred box-office revenues from additional markets, like home media and television, as well as online release methods later introduced, such as digital rentals and video-on-demand. However, Steve Neale and Sheldon Hall note that in the early 2000s, the revenue generated by DVD sales became significant, meaning that the home media and other markets were not necessarily secondary, but complementary, and even another chance to generate a lucrative profit for studios (2010, p. 257). But this would change a decade later with the advent of streaming.

Streaming marked a significant moment in contemporary home viewing, as it extended from the early movements of television, the subscription model of cable, the personal playback and curation of physical media, and the digital availability of the internet. In 2015, Netflix began to produce and release their own original films directly to the platform worldwide, either completely bypassing the movie theatre or disregarding the theatrical window with a limited period of exclusivity or day-and-date release. This meant that subscribers had access to new releases in the comfort of their homes, releases which grew in critical acclaim and awards recognition, as well as budget and star power. Whilst DVD established a status quo as a complementary revenue to the box office, settling the tensions between the cinema and home viewing markets that had existed since the 1950s, streaming would reignite this debate, leading to discourse and controversies. This included film festivals such as Cannes pulling streaming originals and stating that films shown In Competition should have the intention of theatrical exhibition after playing two Netflix titles in the 2017 festival, as well as filmmakers like Steven Spielberg arguing that streaming films resemble a more television release model and should not be considered for Oscars or other movie awards as a result (Lang, 2019). By the time of the pandemic's arrival, there were industry-wide debates taking place, but as the virus shut down cinemas, it meant that audiences had other methods of watching movies and that studios and distribution companies

had alternative methods of release available for the first time during a global crisis. Streaming was no longer merely complementary to the box office, but a substitute. Whilst it was a time of uncertainty, as the industry was forced to examine a multitude of factors without any blueprint or projection for the months ahead, it also created an opportunity for key movements to shift within the industry, and for drastic changes to traditions and practices to be made.

Moreover, just like the film industry, my own research had the opportunity to shift and accelerate towards something new and different. If there was ever a year to document what was happening within the industry on a daily basis, it would be 2020. I had predicted that 2020 would be an important moment, but I had no idea of the true extent. I was documenting a crisis daily and investigating whether the emergence of Covid had forced the film industry to adapt in order to survive (alongside the advancements occurring simultaneously) or whether it simply created an opportunity for the acceleration of changes that were set to occur anyway.

My thesis examines the Coronavirus pandemic and its impact on cinema in the United Kingdom as a case study, focusing on key events that occurred and the decisions that were made as a result of the virus. Whilst Covid's sudden emergence was unpredictable, the situation that cinemas found themselves in was the result of years of gradual developments leading up to the year 2020. In order to understand the true impact of the pandemic, the approach taken in this thesis is to contextualise the covid pandemic within cinema history, and specifically in regard to key moments in the development of cinema exhibition in relation to other home viewing alternatives. In doing so, this thesis is guided by the research of Oliver Grau. Writing about Media Art History, Grau argues that an approach that frames recent art against the backdrop of historic developments allows for a greater familiarity of history, to better understand which aspects are new and which are inherited (2010, p. 8). Grau continues that history is a valuable aid to understanding the present and the future, as it allows the new, faster paced landscapes to exist within the established disciplines of art. This approach allows for the detailed discussion of film exhibition during the Coronavirus pandemic to be framed within the context of the myriad of historical events which impacted upon exhibition in relation to home viewing and which would prove to be such a significant element of the pandemic period. Due to the global nature of film business, it involved looking at developments which were either US-based, such as streaming services, or which began in America and impacted the UK. As a result, my thesis is split into two sections, "Section 1: Pre-Covid" and "Section 2: Covid and Beyond".

Section 1, which consists of six chapters, explores key shifts and introductions from within cinema's history that have previously established and later challenged the status-quo between studios and theatre chains. The section leads up to the moment of Covid's arrival, charting the developments

that identify where the UK exhibition and distribution industries were at the moment of the pandemic's arrival in early 2020.

Before Section 2 analyses the situation that cinemas were in as a result of Coronavirus, Section 1 starts by examining what happened the last time that cinemas faced a pandemic. The first of the six chapters in Section 1 is "Cinema and the 1918 Influenza," which explores a previous global health pandemic. While the 1918 Influenza, also referred to as The Spanish Flu, took place over one hundred years ago, it is a precedent for how cinemas have previously responded to a pandemic, as well as how the outbreak of a disease can impact society. The 1918 Influenza also occurred at a time when cinema was unchallenged as a form of movie consumption, which was a very different situation to what the industry would face 100 years later. To provide the historical framework of the discussion in Section 2, the rest of this section will focus upon key moments in cinema history which changed the paradigm of film exhibition and led to the situation in which the exhibition sector found itself in by the arrival of Coronavirus in early 2020.

Chapter 2 is titled "The Change to Digital Projection and Distribution" and examines almost a century of technical development within the movie industry, from the advent of sound and colour in the late 1920s to early 1930s, to the transition from celluloid projection to digital at the start of the 21st century. This chapter also focusses on how the development of technology has paved the way for formats that seek to enhance the immersive experience of movie-going, from widescreen to IMAX, to even fads, like 3D. Cinemas have also used these technical formats to combat the growing appeal of home viewing since the 1970s, by emphasising the spectacle of the big screen. Despite television and home media being additional markets for movie watching, digital technology has helped to both establish cinema as the preferred source of revenue for studios and theatre owners, as well as the overall status quo of the movie industry.

Chapter 3, "The Advent of Streaming: From Physical Media to Digital Libraries", focusses on home viewing as an additional form of movie-watching, and how the use of digital technology has paved the way for streaming and digital viewing. This chapter explores the introduction of television to the roll out of various formats of physical media, like VHS, DVD and Blu-Ray. Whilst studios have embraced these formats, home markets have been regarded as secondary to the theatrical release. As technology developed, the emergence of the internet has increased the digital availability and accessibility of movies, and ultimately paved the way for the modern-day streaming platform. Streaming provides a significant and new release strategy, while granting audiences with greater freedom and choice to watch what they want, allowing it to position itself over television and physical media as the new primary alternative to theatrical consumption.

The next chapter, “The Impact of the Theatrical Window,” examines a key concept and model within the film industry. The theatrical window is the length of time between a movie’s cinema and home release and was a pivotal tool in establishing the relationship between studios and theatre owners, as it ensured lucrative revenues for all parties. But with technology and digital habits evolving significantly throughout the 21st century, and streaming growing in popularity throughout the 2010s, the theatrical window is a model that has not adapted accordingly to other industry developments, which in a way hinders the economic potential of certain films. This chapter also examines three case studies of the three highest-grossing films of all time prior to Coronavirus, *Titanic* (1997, Cameron, USA), *Avatar*, and *Avengers: Endgame* (2019, The Russo Brothers, USA) to understand box office trends and audience behaviours in almost-decade intervals over time, that lead up to the pandemic’s arrival.

The penultimate chapter in this section, “The Changing Consumption of Film”, draws together the threads of the previous chapters by examining the final significant development in the pre-pandemic industry, which is the evolving of social behaviours. Just as studios have embraced different theatrical viewing formats and different home viewing markets, the industry has walked into a situation of embracing new forms of viewing habits, too. This includes binge-watching, fandoms, franchises, and online discourses on social media platforms, and this analysis contextualises how viewer experiences have changed as a result of the evolving technical parameters that surround their life. This chapter also further highlights the impact of cinema on a social level, which is pivotal for both the last chapter of this section and the analysis of cinema and Coronavirus in Section 2, as a whole.

Section 1 ends with the chapter “Cinema Vs Streaming” which completes the synthesis of the key ideas developed from the previous five chapters in the section and contextualises it within the discourse between streaming and cinema, which was particularly prevalent within the industry, from film festivals to award shows, by the time of Covid’s arrival in early 2020. This chapter establishes exactly where the industry was before the sudden emergence of Coronavirus shut it down, and closed movie theatres on a global level as a result. Throughout cinema’s history, there has been a focus on enhancing previous practices, and professionals have been focused on trying to maximise their profits and revenues through new technology, methods, and release markets. Streaming’s ability to offer studios a new digital release method, as well as grant audiences with new titles available in the comfort of their own home, is the ultimate use of digital technology to enhance upon previous viewing formats. At the same time, cinemas have also used technology and enhanced viewing formats, such as 4DX or more premium and luxury formats like Luxe, to combat the appeal of streaming. Before the pandemic arrived, audiences had a range of choice on where and how to watch movies, whether to see a film theatrically, on physical media or streaming, a choice between the spectacle of the cinema and the

comfort of the home. It is also at this moment in history when the industry was poised for a battle for audiences between cinema and streaming.

When the pandemic arrived, it resulted in the closure of movie theatres, and in turn, brought a drastic shift to the very status quo between studio and exhibitor evident in the first section. The drastic and unforeseen impact of Coronavirus provides a pivotal moment to examine, analyse and understand the decisions made by the film industry during this time, as well as a moment to reflect upon the century of changes between this and the 1918 Influenza. Coronavirus emerged at a time of conversations, gestations, and conflict within the industry, and the second section of this thesis is framed by an examination as to whether the pandemic created change or simply accelerated an already developing process. Section 2, "Covid and Beyond", is divided into three chapters, which helps to keep a concise track of the relevant events within the timeline of Coronavirus. At the same time, it allows the analysis of the situation that cinema was in when the pandemic emerged to be historically contextualised with the movements and gradual developments observed throughout Section 1.

The first chapter is titled "Cinema and Coronavirus" and, in dialogue with the first chapter in Section 1, "Cinema and the 1918 Influenza", it follows and examines the impact of a global pandemic on society, public behaviours and the film industry that have occurred after a century of technological advancements. As Section 1 examines, between the two pandemics, there have been significant changes and developments within the industry that have altered the situation in which cinemas have found themselves. This chapter analyses the shifts and decisions which took place amid multiple lockdowns, from the closures of cinemas to their attempts at reopening, as well as on a more personal level by understanding how the virus impacted everyday lives. It also discusses how the film industry responded to the pandemic, in terms of what films were in production, how the virus was depicted in film through story and subject matter, and how these changes relate to the continued development of technology during this period.

Following this chapter is "Streaming and Coronavirus" which explores a similar timeline to the previous chapter but instead focuses on how the streaming industries responded to the virus, and what developments occurred throughout this period. For instance, studios developed and implemented new release strategies and methods during the pandemic, such as PVoD (Premium Video-on-Demand), which shortened the gap in the theatrical window and blurred the line between cinema and streaming. This chapter also explores the roll-out of multiple studio-owned streaming platforms that occurred in this period, which further highlights a change in the status quo, as the relationship between studios and streaming companies became more significant. Although the plans for studio-owned streaming services pre-date the pandemic, they certainly benefited from and were

accelerated by the absence of the cinema, thus resulting in a further shift in the balance of industry power. These ideas and developments continue the discourse and discussions that have taken place around cinema and streaming since before Covid's arrival but view them in a new light and under new circumstances, to further assess the role that movie theatres have within the industry and society. Moreover, it considers whether Coronavirus prompted these changes and decisions to occur, or whether it simply accelerated a process that was already developing, which leads directly into the final chapter of the section.

Section 2 ends with "Cinema Vs Streaming: Part II" which revisits the discourse that ended the first section but in light of the events that occurred as a result of and throughout the pandemic and seeks to establish how these might impact the future of movie-going, viewing habits and the overall aesthetic of cinema. Whilst the timeline of Section 1 was vast, covering key events and developments from cinema's history that took place over a 120-year period leading up to the moment before the Covid outbreak began, Section 2's timeline is significantly more condensed. The true extent and effects of Coronavirus could take years or decades to truly understand, and writing a thesis on events occurring in real-time can often rely on developing news occurring on a daily basis, which is why it is important to establish a clear date range for the events observed in Section 2. The first reported case of Coronavirus occurred on December 31st, 2019, and while it spread globally in the following months, its first notable impact on the film industry was the decision to delay the release of *No Time to Die*. The 18-month period between the March 2020 postponement and September 2021 release saw three lockdowns in the United Kingdom, three attempts at exhibitors trying to reopen venues, and months of changing and evolving social attitudes. *No Time to Die* was the first film to take the risk of postponement, whilst facing an uncertain future, with no way of knowing whether or not there would be a theatrical climate on the other side of the virus, or even if there would be another side, at all.

It is because of this that the 18-month period for *No Time to Die* makes the perfect data range for Section 2, and although the impact and outcomes of the virus are ongoing and continue to occur and develop beyond the release of the 25th Bond film, limiting the section with an end date can help to analyse this specific moment and speculate about the future of the film industry. Furthermore, with the pandemic marking a significant turning point for the film industry, where studios and other professionals are forced to make critical decisions on how they operate, the title of the 25th Bond film, *No Time to Die*, becomes a metaphor. The decisions made throughout the 18 months are pivotal for the entire longevity of cinema, as it was truly no time for cinema to die.

The conclusion and coda of this thesis also briefly look beyond the release of *No Time to Die*, to begin to understand and question the unfolding effects of the pandemic on other film releases, audience behaviours and industry decisions that took place in the subsequent years.

Throughout this thesis, I will examine key moments in the history of cinema, from its inception to current innovation, from the economic incentives that shaped decision-making and creativity to the constant drive to improve upon previous movements, models, and practices. Cinema has been through an evolutionary set of transitional periods, from black and white to colour, from silent films to talkies, from celluloid to digital projection, alongside decades of advancements within television, home viewing and the internet that led to the emergence of modern streaming. The advent of streaming shifted release strategies, introducing day-and-date releases and reduced periods of cinema exclusivity. Covid's emergence reignited the debate around theatrical and home viewing and streaming was seen as cinema's greatest opposition, thus dividing the industry, with some defending it for the creative freedom it offered, and others against it, as it undermined decades of theatrical traditions and practices. With every transition in cinema's history, there has always been an initial moment of restraint and resistance before new technologies become accepted and appreciated for what they offer and bring to the previous processes. Cinema emphasises the spectacle and experience with technology to maintain its position as the primary market and preferred revenue, but with the advent of streaming challenging this status quo, what does it mean when the pandemic brings a closure to movie theatres?

During Coronavirus, the closures of cinemas globally and the continued development of technology and streaming occurring simultaneously at a moment of uncertainty posed the most significant paradigm shift in the industry's history. Would streaming supersede cinema as the superior format for both movie consumption and generating profit? Moreover, would Covid's emergence prove to be an opportunity for changes and shifts to occur, a catalyst that accelerates discussions already taking place, or just a roadblock in the trajectory of the movie industry? Exploring a multitude of developing factors converging at a global standstill, the impact of critical decision-making on social behaviours and habits, industry norms and movie practices, as well as the fears and anxieties attached to a global disease, can all help to understand the pivotal roles of cinema and streaming before, during and beyond a pandemic.

Literature and Methodological Review

As the thesis has two distinct sections that explore specific date ranges, with the second section being much more contemporary, it means that there is a difference in the sources researched and used for each section. Section 1 relies on more traditional academic sources, such as books, journals, and other publications, whereas Section 2 features online articles and news reports more prominently. This literature review and methodology highlights some key ideas and perspectives used within the research, the process that has been undertaken in order to gather credible contemporary sources, as well as the tools used to investigate and frame my research.

Cinema is evolving, and alongside it, the very discipline of film studies is changing, too. This is evident with the transition from academic to more contemporary online sources, but also apparent in international conferences, such as Gertjan Willems' 2019 conference entitled 'Research Methods in Film Studies: Challenges and Opportunities'. Willems notes that the history of film studies has always been one of transdisciplinarity, meaning that it takes approaches and questions from other areas of research, such as the humanities and social sciences, to analyse the topic of film and cinema (2019). But cinema, like the humanities and social sciences, is heading towards the digital era, and the rise of digital humanities has welcomed a variety of new sources and tools, which would not necessarily have been regarded as academic or traditional (Willems, 2019). This is also apparent within the wider field of cultural studies, and as the thesis embraces digital approaches to research when investigating more contemporary moments in history, it draws upon theories and ideas associated with cultural studies.

John Hartley writes that cultural studies take ideas from many different academic backgrounds and positions to provide a "lively field of debate and discussion" (2003, p. 2). He continues that it resembles a bazaar for the exchange of ideas in many directions, from the traditional and historical ideas of the past to those that rethink, and remake frameworks inherited from intellectual history. Hartley calls these "inherited truths," which are the traditional ideas passed down through generations of scholars. Cultural studies, he proposes, allows these inherited truths to be reviewed in the modern era, in light of the progress, science and frameworks of discourse that have emerged and developed in the intervening years. This idea is similar to the work of Oliver Grau, and his theory of Media Art History forms a key approach taken in this research. Grau argues that focussing on contemporary situations against the backdrop of historical developments is a valuable tool that aids to the understanding of the present and the future (2010, p. 8). In addition, with the contemporary media landscape appearing more different and fast paced to previous disciplines within art history, Grau adds that a familiarity of media and history allows for recent developments to be better analysed for which aspects are new and which have been inherited from the past. This is a pivotal idea for my research as

using academic sources to understand the film industry in Section 1 involves a tendency towards inherited truths and historical familiarity, whereas the digital sources analysed in Section 2 allow for these ideas to be revised through an understanding of contemporary developments.

The process of re-engaging with older sources and ideas in a new light is similar to Jay David Bolter and Richard Grusin's theory of remediation, which argues that the advent of new media does not make an older one obsolete, but reforms and improves upon it, whilst maintaining certain elements (2000, p. 59). They use the example of animated films, which have increasingly used digital technology throughout the 1990s, remediating the medium of video games, computer graphics and digital narratives into cinema and storytelling, whilst maintaining the characteristics of traditional animated films, such as classic Disney movies (p. 147). Remediation is evident in other industries with the rise of technology in the following two decades since publication. For instance, streaming services featuring pages of movies and television shows that adopt the features of television channels and traditional programming guides and displays. Bolter and Grusin continue to argue that "the remediation of material practice is inseparable from the remediation of social arrangements," suggesting that how media is used impacts the ways in which members of society interact with one another (p. 69). Moreover, the use of social media in contemporary society, and even Zoom in the pandemic, are using modern technology in a way that remediates older mediums of communication, such as phone calls, emails, and even letters. The thesis follows the cultural studies approach to remediation, by remediating past and existing theory to form new, modified tools to research and study events within the contemporary film industry.

The theory of remediation also informs Henry Jenkins and David Thorburn's *Rethinking Media Change*. They write that new technology is often assumed to replace older systems, but in terms of media, the transition from old media to new media has created an opportunity for tradition and innovation to collide and collaborate with one another (2003, pp. 10-11). This collision stems from Jenkins' model of convergence, which involves bringing old and new media together and allowing old ideas to be borrowed and used in new ways (p. 3). The idea of convergence has become increasingly prevalent within the film industry as developments in digital technology led to an increase in transmedia storytelling. Transmedia is the horizontal integration of media across multiple industries, and transmedia storytelling disperses elements of a film and its story across media platforms (Jenkins and Thorburn, 2003, p. 283). It allows elements of a franchise or media property, such as characters or aspects of the plot, to be integrated throughout various different mediums. For instance, Jenkins and Thorburn use the example of the *Star Wars* franchise, which at the time of their writing, involved feature films, holiday shorts, toys and memorabilia, and the licensing of *Star Wars* iconography with a multitude of corporate partners, which demonstrates how a franchise can be reinvented throughout

various mediums (p. 285). However, this is even more apparent in the contemporary industry. Continuing with the example of *Star Wars*, the emergence of social media has provided a space for online fandom, the launch of Disney+ has led to original *Star Wars* programming being streamed at home, and the release of multiple video games has continued fan engagement and participation. *Star Wars* may have started as a 1977 film (Lucas), but it has since expanded to multiple industries and sectors that all converge. This further demonstrates that cinema is more than just a singular medium, but an interconnected matrix of branching industries and disciplines. Therefore, discussion and discourse surrounding cinema should not be limited to film studies but should draw ideas and arguments from the broader field of cultural studies.

Another relevant theory is Shane Denson and Julia Leyda's post-cinema perspective. They define post-cinema as the 21st century industry shaped by the emergence of new digital media formats, such as the internet and streaming, which deviates from the previously dominant forms of cinema and television in the 20th century. They add that post-cinema is not just a collection of these new media formats, but a long list of traits that characterise the media landscape of the 21st century; a landscape that has evolved and developed over time, emerging and expanding from the existing developments (2016, p. 2-6). Furthermore, they note that the term post-cinema helps to differentiate these new media formats from the older dominant forms of media, without suggesting a clean break or shift from old to new. Instead, new media formats are an extension that follows on from traditional practises and forms and use modern developments to take them into a new direction, with a new way of thinking. It again reinforces the idea of remediation, by applying the theory surrounding older formats as a tool to understand the new media formats of post-cinema. Whilst new forms have been introduced throughout the 21st century, such as the shift from celluloid to digital projection at the start of the millennium, to the rise of digital marketplaces in the mid-2000s, with Netflix launching the first online streaming site in 2007, to the growth of day-and-date releases in cinemas and online platforms in the 2010s, the pandemic marks a moment where the absence of the movie theatre allowed the industry to follow these new practises, and truly establish post-cinema. Denson and Leyda note that post-cinema is an ongoing historic transition, and as Coronavirus shut down industries and movie theatres, the technological nature of new media formats has allowed them to continue forward (2016, p. 2-6).

Both remediation and post-cinema are concepts used to map the industry changes occurring over decades before the impact of Covid, but with Section 2 focussing on the Coronavirus pandemic, it means that most of the section relies on online sources, such as articles, news reports and interviews. As this research uses modern and digital sources, it also draws from the approaches of reception studies and production cultures research, which helps to create an understanding of

industrial viewpoints at key moments in history on a more personal and reflective level. The approach to this thesis is therefore a synthesis of cultural studies, reception studies and production studies as a historical overview of industry practices.

Reception studies can be tracked back to the 1980s through the work of Barbara Klinger. In 1997, Klinger argued that reception studies, in regard to cinema, typically observed a film and a filmic element within an intertextual field, such as censorship or exhibition practices, within the overall ideologies of a society at a particular time (pp. 107-108). This allows cinema and its adjacent fields to create an understanding of a moment in history through the discourses, social beliefs and political regimes that have occurred at the time. Therefore, by researching a moment from cinema's history through the discussions surrounding a film, its reception and reviews, it can form the basis of an understanding of the ideologies of a society at the time. This is pivotal for the research of this thesis, which navigates industrial development between two pandemics over a century apart from one another. Analysing the films exhibited during the time of a pandemic, from their subject matter to themes, combined with government advice, social reactions and box office statistics can create a unique understanding of what types of films were popular during a pandemic, what messages were studios trying to audiences, and what differences have there been between Influenza in 1918 and Coronavirus in 2020.

A similar approach is taken in the work of John Caldwell decades after Klinger in the field of production studies. Caldwell argues that the role of film and television in pop culture has been a much-studied perspective for decades, but film is also formed of production communities that have established their own identities and cultural expressions (2008, p. 2). In order to understand the evolving industrial infrastructures, it is therefore important to analyse the social groups and frameworks on a production level. Caldwell continues that rather than analysing the on-screen film material, his research focussed on personal interviews, reporting and economic analysis to provide a greater knowledge and understanding of the industry. Caldwell adds that industry knowledge on a production or insider level has typically been the result of highly coded and inflected layers of public relations management, and whilst these have been typically avoided in media studies research, instead they are embraced within production cultures to strengthen an understanding of industry intention throughout the years (2008, pp. 2-3). In 2013, Caldwell argued that the intersection of film and marketing made the industry "a mess for scholars to research" and that media and film historians have not meaningfully engaged with research systems outside of cinema to better understand it (p. 163). Caldwell suggests that traditional tools and archival research towards film needs to be combined with ethnographic and cultural-economic frameworks to better understand the complex institutions that produce them. Caldwell's work provides a useful tool for historical surveying in this research, as

focussing on news articles and press releases supplied at times when the industry has navigated two pandemics, in 1918 and in 2020, can demonstrate an industrial understanding through the use of language or choice of information shared with the public. Whilst this research does not conduct interviews, the 2020 pandemic impacted upon industry professionals and livelihoods at the same time as films, and therefore this thesis draws from online interviews and news articles. This helps to establish a broader view of the industrial and economic impact of Coronavirus, but at the same time, understand how it is disrupted professionals on a personal level. In addition, obtaining and using interviews from filmmakers, exhibitors or distributors before and during the pandemic can also provide a pivotal understanding of industrial changes on a personal and reflective level.

With the film distribution being a significant talking point in the research on the pandemic and the subsequent closure of movie theatres, the production cultures approach can also be applied to the analysis and investigation of the distribution industries, and in particular, what social, economic and political factors impact how a film is seen and why. Ramon Lobato argues that although film distribution is not a dominant theme within film literature, distribution networks have been studied from various perspectives, and yet, the focus tends to be solely on formal institutions from studios to broadcasters (2012, p. 2). Instead, Lobato defines distribution as “the movement of media through time and space”, adding that a broader definition invites wider perspectives from media and cultural studies to be included. In addition, Lobato adds that film theory has typically observed formal distribution networks as formal distribution, when informal counterparts have played an equally vital role in film’s history. Informal distribution includes low-end DVD markets, bootlegs and internet networks, and as the modern industry is global, it should analyse the entire range of distribution networks and systems in place around the world (2012, pp. 2-3). In Lobato’s 2019 book, *Netflix Nations: The Geography of Digital Distribution*, he observed digital methods of distribution, including streaming services, like Netflix, to add that the internet has become “a distribution channel and an archive for a diverse range of content” (pp. 6-7). Lobato’s work pre-dates the pandemic and views streaming services and digital platforms as television’s digital transformation, and as a consequence, calls for a rethinking of the assumptions of television studies as it now assumes the same infrastructure of other media. However, this research chooses to focus on cinema and throughout Section 1 explores the evolving nature of film distribution from roadshows to wide releases to digital methods that lead up to the advent of streaming. The discourse surrounding streaming and digital distribution has already invited the work of scholars like Lobato, but streaming’s dominance throughout the pandemic has further established the new media landscape and shifts in power balance within the industry. As Lobato noted for television’s digital transformation, film distribution has also transformed significantly in the modern, digital, pandemic era, and an understanding of wider media and cultural studies, as

well as the social, political and economic developments that surround it can all help to truly understand the evolving industrial landscape.

Streaming has played a significant role in the shaping of the modern film industry, with how it releases films globally and digitally. Roderik Smits argues that film release strategies have developed rapidly since the arrival of streaming platforms in the mid-2000s, from a period of trying and testing, to the dominance of streaming services with original productions to the more contemporary situation surrounding the Coronavirus pandemic and the closures of cinemas (2024, p. 86-89). Smits' work was published post-pandemic and therefore provides a more current observation of the distribution and streaming industries. He adds that the dominance of streaming creates concern for the future of the traditional, staggered release model, as studios choose to now invest in their own platforms as streaming services ultimately bring film distribution to a greater, global population. In addition, Smits' research into the tension between streaming and theatrical distribution amid the pandemic draws on theoretical observations of streaming's role within the distribution industries and evolving digital landscape of the film industry prior to the pandemic and can ultimately provide a significant tool for researching an historic overview of industrial practices. When streaming platforms were first introduced, as noted by Smits, it was a period of experimentation, and this continues into this research on the pandemic and the experimentation that studios had with their own streaming services, with new release strategies, such as PVoD, as well as at a time when theatrical exhibition was absent. It also provides a framework to contrast with earlier moments of experimentation from streaming's historical development observed in the first section, from the early Netflix models to simultaneous releases for original titles in select theatres and streaming platforms. When this framework is synthesised with production cultures and reception studies, it provides an approach for observing industrial change over time, the changing viewpoints of industry professionals throughout history, and invites an overall wider call for understanding the new media landscape.

As a part of the thesis, one of the methods conducted was the taking of daily logs of relevant news stories and interviews with key industry figures, as well as key dates, statistics and data that emerged from Coronavirus. Twitter/X was one of the platforms that sources were taken from, which, although is primarily a form of social media, publications and news organisations also use the platform to share stories as they emerge, and at the same time, individual journalists, industry professionals, and enthusiasts can also directly respond and share their opinions and beliefs.

Moreover, the daily logs of information and sources were categorised and stored across several documents, grouping stories by key themes, ideas and developments that were taking place. For film developments throughout the pandemic, these were predominantly obtained from film

websites, including *Variety*, *Screen Daily*, *Deadline* and *The Hollywood Reporter*, which I deemed reputable, as they are all long-standing film magazines with a history of reporting movie news, box office figures and other relevant coverage. As stated by David Domingo, the benefit of an online website allows for more up-to-date news and developments to be obtained (2008, p. 17). Additional online sources were taken from other film websites that do not have any physical publications, such as *IndieWire*, established in 1996, and *Collider*, founded as a blog in 2005, as these often allow for a greater variety in the information accessed, such as coverage of independent cinema or interviews with various members of the filmmaking process. Furthermore, as the thesis investigates the 2020 pandemic, it focusses on franchise films as examples and case studies. Derek Johnson argues that “franchising is something that media industries have negotiated to navigate both economies and creativities” and holds significant value for understanding “why the culture industries reproduce shared culture” (2013, p. 26). Therefore, franchise films can provide an understanding on the decisions and developments occurring within the industry during the pandemic on both a creative and an economic level.

In addition, news surrounding the pandemic and its social, economic, and political implications were taken mainly from online news websites, such as *the BBC*, *The Guardian*, *The Times* and *The Independent*. All of these examples, as based on a survey conducted by YouGov, do not have obvious right or left-leaning political bias, and would therefore ascertain a certain kind of truth within its sharing of news and developments (Smith, 2017). Other statistics surrounding the pandemic were also taken from government officials through interviews, briefings, and official websites, as well as other relevant professionals informed on the topic, to ensure that the information shared was accurate. Furthermore, one factor which was considered when conducting research with online and digital sources was the growing use of fake news.

Josh Compton et al. note that during the pandemic there was an emergence of conspiracies and rampant misinformation that was being spread alongside official information and guidance, as 46% of the UK population reported exposure to fake news (2020, p. 2). The idea of fake news relates to the concept of post-truth, which has become more apparent through networked journalism. Post-truth is not just the use of lies, but instead also the use of concepts instead of facts, which in turn “undermines the theoretical infrastructure” of conversations and truths (Bufacchi, 2020, p. 2). Vittorio Bufacchi adds that although post-truth was declared word of the year in 2016 by Oxford Dictionaries, popularised by Donald Trump and his presidency, its use in media long precedes it, for example, it was used in the reporting of the 2003 invasion of Iraq (pp. 1-2). The concept of post-truth can also be attributed to the reporting of the 1918 Influenza. For instance, as Spain was neutral during the First World War, Spanish media reported and covered the virus with a lot more honesty than other western

outlets, who did not want Influenza to impact wartime morale. As a result, the pandemic was referred to as The Spanish Flu by western news articles, allowing the public to believe it originated from Spain, when in reality the geographical origin of the virus remains uncertain (Dionne and Turkmen, 2020). With post-truths evident in a century of news reporting, the issue that arises is that some people are willing to believe entirely what is reported and accepts these post-truths or fake news headlines as facts. This can ultimately impact the discussions and discourses that are framed around important events and developments. Jesse Singal writes that more and more people are believing internet rumours, and this is due to a number of reasons (2017). For instance, the more politicised an issue, the more it relies on personal thoughts and values, which means that for issues like climate change or the pandemic, people are more likely to have their opinions motivated by their political leaning, whereas non-politicised facts will allow for greater responsiveness to accuracy and the truth. Moreover, prejudices, personal emotions and past experiences are other factors that could influence how people can be impacted by directionally motivated reasoning. Ultimately, people are either motivated to get the accurate truth, or motivated to seek support for a position already held, and with the spread of post-truths, in a space where journalism can derive from personal blogs and social media accounts, the desired truth can likely be found, but whether it is accurate or not is a completely different question.

Investigating contemporary and ongoing issues, like the pandemic, means it is important to consider post-truth when obtaining sources. This includes knowing the origin of the source and avoiding any sources that are extremely right or left-wing leaning, as these can convey the personal emotions of the author in the sharing of the story. This remains an important factor to consider when researching other developments occurring within the film industry simultaneously with Coronavirus. The key tool for researching these emerging debates and discourses, such as those around cinema and streaming, takes the ideas and theory from the traditional sources of Section 1 and remediates it as a tool to investigate ongoing issues in Section 2. Furthermore, as Section 2 uses digital and online sources to stay up to date, it is pivotal to understand where these sources come from, what values they hold, and what truths they share.

The research focuses on key moments and pivot points from cinema's history to contextualise discussions surrounding the contemporary industry. This also led to identifying key sources around these moments. For instance, the theatrical window was an important model before, during and after the pandemic, and Hasan Bakhshi's 2007 article "The Theatrical Window: Uncharted Waters?", explores the reduction in the period of cinema exclusivity between 1999 and 2006. Digital cinema, the transition from celluloid to digital projection, and home media platforms are also pivotal moments within cinema's history, and key sources surrounding them include: John Belton's article, "Digital 3D

Cinema: Digital Cinema's Missing Novelty Phase" (2012), which explores digital technology and fads like 3D, Steve Neale and Sheldon Hall's book, *Epics, Spectacles and Blockbusters: A Hollywood History* (2010), which discusses blockbuster cinema of the early 2000s, and the impact of home media as an additional source of revenue, as well as Andy Willis and Jonathan Wroot's book *DVD, Blu-Ray and Beyond: Navigating Formats and Platforms within Media Consumption* (2017), which examines the changing attitudes to home media formats. The production industries and industrial reflexivity is explored in John Caldwell's book, *Production Culture: Industrial Reflexivity and Critical Practice in Film and Television* (2008). Moreover, the advent of streaming is a significant focus in the research, and whilst streaming is still relatively new and rapidly evolving, there have been academic sources that cover the topic in the early-to-mid 2010s, including Justin Grandinetti's article "From Primetime to Anytime: Streaming Video, Temporality and the Future of Communal Television" (2017), which discusses the evolving nature of television consumption as a result of streaming, as well as Djoymi Baker's article "Terms of Excess: Binge-Viewing as Epic-Viewing in the Netflix Era" (2017), that explores the concept of binge-watching in relation to contemporary movie consumption. Ramon Lobato's books, *Shadow Economics of Cinema: Mapping Informal Film Distribution* (2012) and *Netflix Nations: The Geography of Digital Distribution* (2019) also chart the development of the distribution industries from traditional models to digital distribution networks and streaming platforms. Furthermore, Roderik Smits' article "Theatrical Distribution or Online Streaming? Release Strategies in Europe in Times of Disruption and Change" (2024) examines the tensions between digital distribution and streaming with theatrical releases in the contemporary industrial situation.

With the research consisting of a balance between traditional and modern sources, it very much encompasses the shifts and movements occurring within both the movie industry and film academia. There is a divide between old and new, between tradition and innovation and between what has been and what will come, but these new, modern practices and methods are never isolated from their predecessors; instead, they embrace, collaborate with, and pay homage to them. The framework for this research involves a combination of examining key moments and ideas from cinema's history and remediating them into discussions of the contemporary industry, understanding the practices and tools from other disciplines, such as the wider cultural studies and reception studies, as well as theorising up-to-the-minute developments as they occur. This research also draws from the work of production and industry scholars, such as Caldwell, who established the importance of researching, navigating and understanding historical industrial moments by the ethnographic and cultural parameters surrounding it. By following this approach, I undertake a theoretical examination of the film industry leading up to Coronavirus, followed by critical discussion of the pandemic and its

impact on cinema exhibition and distribution in the United Kingdom, with the intention of understanding what it means for the future of the industry.

Section 1: Pre-Covid

It is generally accepted that the inception of cinema took place on December 28th, 1895, when the Lumière Brothers “rented a basement room to project a program of ten films for the first time to a paying audience” (Cook, 2004, p. 10). The film prints were each roughly 17 meters long and ran at approximately 50 seconds. The first film on the program, *Workers Leaving the Lumière Factory* (1895, France), showed an everyday scenario filmed from across the road as if the audience were standing there, whereas David Cook describes another title, *Arrival of a Train at La Ciotat Station* (1895, France) as a “visual tour de force” that created the myth that “audiences dodge[d] aside at the sight of the locomotive” (2004, p. 4). Both of these films demonstrate a desire to immerse audiences in cinema, from engaging with characters to a spectacular moment that could not be seen the same way in real life, respectively. However, not all audiences were captivated by early cinema, as Maxim Gorky wrote of his first experience seeing a film, where he was “in a kingdom of shadows”, a monotonous grey place without sound or colour (1896, pp. 407-409).

As cinema would evolve beyond the Lumière Brothers, so would technology, bringing a multitude of technological introductions to cinema screens, from sound and colour to widescreen, from digital cinema to IMAX and 3D. As technology continued to develop, it also brought the introduction of the television and home viewing, and by the 1960s, 75% of UK households had a TV (Belton, 1992, pp. 12-14). Suddenly, cinema was no longer unrivalled, and the later introductions of home media, physical formats and streaming would continue to provide additional methods for audiences to watch movies, as well as alternative markets for studios to generate additional revenues.

This section explores several key introductions and movements from cinema’s history that establish the situation that the industry found themselves in at the moment of Coronavirus’ arrival in early 2020. Section 1 begins by examining the last time that the film industry was impacted by a global pandemic, with the 1918 Influenza, which marked a time when cinemas were the only way to watch a movie. Chapters 2 and 3 chart the technological developments that have occurred in the cinema and home, respectively, leading up to the rise of digital at the start of the 21st century. These two chapters will demonstrate how digital has not only emphasised the spectacle of cinema, from the changing aesthetic conventions of the movie theatre to the immersive viewing formats, but also grants greater convenience and economic benefits for studios and exhibitors, too. Digital technology has also provided more accessible tools for independent filmmakers and digital distribution networks have allowed a wider variety of titles, particularly low budget, foreign language, art house and documentaries, to be released and watched globally. The development of digital in the early 2000s ultimately led to the advent of streaming becoming the primary alternative to theatrical consumption

and thus changing the situation and landscape of the industry for the second pandemic in 2020. Chapters 4 and 5 continue to explore the evolving economic and social changes, respectively, that have established the industry power balances, and relationships between studios, exhibitors, and audiences.

By the end of this section, there will be a synthesis of key ideas, discourses and discussions from cinema's history that range from one pandemic to another one over a century later. This analysis will establish exactly where the industry was before the second section begins to unfold the impact of pandemic on the contemporary film industry.

Timeline of Key Events

Date	Event
28 th December 1895	The Lumière Brothers exhibit a film reel to a paying audience
1918-1919	Influenza, or The Spanish Flu
6 th October 1927	<i>The Jazz Singer</i> is released as the first talkie
1932	Three-strip Technicolour introduced, and becomes the industry standard
1939	<i>The Wizard of Oz</i> is released and popularises colour technology
1952-1954	Widescreen cinema unveiled
8 th November 1972	HBO becomes the first subscription service
31 st October 1976	VHS first released in Japan, ahead of US and international releases
1980	97.5% of British homes and 80% of US households have a television
1985	VHS sales and rentals outperforms the US cinema box office for first time
1 st November 1996	DVD first released in Japan, ahead of US and international releases
29 th August 1997	Netflix launched as a mail-based rental business
19 th December 1997	<i>Titanic</i> is released and breaks records to become the highest grossing film of all time
2000	George Lucas: “in the twentieth century, cinema was celluloid; the cinema of the twenty-first century will be digital”
2002	DVD sales overtake video sales
16 th May 2002	<i>Star Wars: Episode II – Attack of the Clones</i> is released, becoming the first major digital film
22 nd September 2002	<i>Apollo 13</i> is re-released in cinemas and IMAX, and becomes one of the first narrative IMAX releases
March 2003	DVD sales overtakes VHS rentals
2006	UK theatrical window reduced to 16 weeks
16 th January 2007	Netflix launches as an online platform
18 th December 2009	<i>Avatar</i> is released, popularising digital 3D technology and breaking box office records to become the new highest grossing film of all time
2011	Netflix announces it will offer a streaming only subscription, with a gradual global roll out
16 th October 2015	Netflix releases <i>Beasts of No Nation</i> , the first streaming original film
May 2017	The 70 th Cannes Film Festival takes place with two Netflix titles shown In Competition. The festival announces it will no longer exhibit streaming films after backlash
8 th November 2018	Disney CEO Bob Iger announces Disney+, a studio owned streaming services, set to launch in America in late 2019
30 th November 2018	Netflix releases <i>Roma</i> , which becomes the company’s first Academy Award nomination for Best Picture
25 th April 2019	<i>Avengers: Endgame</i> releases and becomes the first film to gross over \$1 billion globally in its opening weekend

Chapter 1:

Cinema and the 1918 Influenza

The sudden emergence of the Coronavirus pandemic impacted the film industry globally in 2020, but this chapter starts this section with an analysis of the last global pandemic to impact cinema, the 1918 Influenza. The 1918 Influenza, alternatively referred to as the Spanish Flu, was a global pandemic that emerged from the end of the First World War and resulted in more deaths “than any other outbreak of disease in human history” at the time (Barry, 2004, p. 4). This chapter will examine the 1918 Influenza and its impact on cinema and movie-going, as well as how the film industry, government and the public responded to the pandemic and the role of film at a time when movie theatres were unchallenged.

In his book, *The Great Influenza* (2004), John M. Barry calls the pandemic the “first great collision between nature and modern science” (p.5), suggesting that although this period in history led to a multitude of deaths, it was also a pivotal moment for science and discovery. The Spanish Flu changed the way that society thought and acted, and at the same time, developments in technology meant that individuals could begin to confront and tackle influenza with modern medicine and vaccines when beforehand society often relied on “calling upon divine intervention to save them from it” (Barry, 2004, p. 5). The actions and decisions made over a hundred years ago paved the way for modern approaches to medicine, and the initial responses and attitudes to influenza are pivotal in understanding the evolving viewpoints of a species. The Spanish Flu not only impacted human health but society and culture too, changing the ways that people socialised and gathered amongst each other. Whilst the 1918 Influenza also impacted other leisure activities and forms of entertainment, including cinema-going, what is particularly pertinent about this historic moment is that it marks the first time that a global pandemic impacted the film industry. This chapter will also examine the films created about and as a result of Influenza, and how they contrast with the filmmaking efforts of the First World War. By examining how society and industry professionals responded to the virus, it establishes what role cinema and films had over a hundred years ago, as well as how attitudes and beliefs have shifted since then.

In March 1918, almost a year after the United States had entered the First World War, an army training ground in Kansas reported that 522 people had fallen ill, and due to the traffic in and out of the training ground, this disease had spread to New York and around the country within a week. Jeffery Morens and David Taubenberger write that over the next 12 months, the pandemic spread throughout Europe, Asia and North America and resulted in three waves. The first cases in Kansas in early 1918

were wave one, with the second in late 1918, and the third in 1919, which was deemed much more fatal (2006, pp. 15-16). The symptoms of influenza ranged in severity throughout this period and included “headaches, vomiting, intense body aches and skin turning unusual colours,” with some turning blue around their lips and others developing darker complexions overall (Barry, 2004, p. 2). The pandemic is estimated to have infected 500 million people, which at the time was “one-third of the world’s population”, and the number of fatalities were estimated at around 50 million, with reports highlighting a range of 17 to 100 million, as the exact number is unknown (Morens and Taubenberger, 2006, p. 15). Furthermore, the case-to-fatality rate of influenza was around 2.5% which was considerably higher than any other previous influenza outbreak or pandemic, which had an average rate of around 0.1%. Barry writes that although the “plague in the 1300s killed more than a quarter of Europe”, a larger global population meant that the influenza death count was higher than any other outbreak (2004, p. 4). The majority of deaths caused by influenza occurred between 1918 and 1920, yet it still took decades for scientists to fully understand what they were dealing with.

The influenza was named the Spanish Flu not because of its origin, but because of its reporting. In fact, the true origin of the strain of the virus is unknown due to an insufficient amount of data, but according to Morens and Taubenberger, phylogenetic analysis of the 1918 viral genome, which was conducted in 2004, “does not place the virus within any geographic context” (2006, p. 16). Walter Shapiro writes that American newspapers practised with “an alarming level of self-censorship” and often sugar-coated the truth, which impacted public perception of the disease (2020). For instance, in 1918, America was heavily involved in the First World War, and yet, at the same time Influenza claimed 195,000 lives and the sitting President, Woodrow Wilson, “made no public reference to the disease” (Shapiro, 2020). This same precedent extended to the European press, as Shapiro continues that “any headline [with] concern about the disease [would] undermine morale” on the frontline of the war. During the First World War, newspapers were one of the only regular and accessible sources of information, and as Barry writes the press’ decision to “make little of the disease” is what made the disease so much more terrifying (2004, pp. 334-335). Barry continues that what was reported about influenza had “no relationship with what people saw and endured.” For instance, Barry highlights a report by the *Providence Journal* that stated that “all hospital beds at forts in Boston [were] occupied by influenza patients”, and yet, the paper downplayed the severity of the disease by stating that soldiers were “told to go to beds” as if it were an order, and it is ultimately this level of reporting that leads to distrust, fear and uncertainty within readers and populations. As Spain was neutral in the First World War, their reporting did not consider the effect on wartime morale, and they were therefore free to report the effects of influenza. But this left the impression that Spain was hit severely and led to the international press adopting the name of the Spanish Flu, and ultimately “shaped how the media

covered the crisis” (Dionne and Turkmen, 2020). In addition, all countries involved in the war decided to report and cover Influenza based solely on its impact on neutral Spain, in an attempt to suppress bad news and concern amongst their own respective populations. Despite post-truth being a term that only emerged in the 21st century, the reporting of Influenza strikes similarities with the notion, as well as the reporting of Coronavirus examined later, as downplaying the virus in order to boost morale, whilst Spain reported accurately, led to newspapers reporting concepts instead of the truth. As a result, the global reporting on influenza othered and marginalised the Spanish population, by acting as if something was wrong with them, in particular, when in reality, it was also occurring in the other wartime nations. This level of reporting was also evident with the First World War, but newspapers were not the only medium that achieved this.

During the war, cinemas became another way of getting information to audiences and the general public across the country, much like newspapers. As part of a general entertainment programme exhibited in movie theatres, cinemas often featured newsreels, which in the 1910s, typically lasted five minutes with a collection of five or six news stories. At the start of the war in 1914, the British government saw little place for filmmakers on the frontline and excluded cinematographers from capturing the war, as there were “plenty of other measures of learning [the war’s] sorrows” (*The Bioscope*, 1914, p. 859). But as time progressed, the press responded that citizens had the right to see the war accurately, especially as cameras had the “ability to record the actual likeness of events” which might even boost morale and patriotism (*The Bioscope*, 1914, p. 859). However, in 1915, following constant pressure from J. Brooke Wilkinson and other representatives from the Kinematograph Manufacturer’s Association, a trade organisation for cinematographers, the War Office came to an agreement for the “production of two categories of war films” which were “films for immediate exhibition” and “films designed for historical records” (Sanders and Taylor, 1982, p. 125). The first category included materials that would compose newsreels or anything that would essentially boost patriotism across the country, such as *The Battle of the Somme* (1916, Malins, UK), whereas the latter would show more of the reality and desolation of war, that would not be exhibited publicly on cinema screens and remain in archives. This includes the film *War Neuroses Netley, 1917* (1917, Hurst, UK) which captures the treatment of shell-shocked soldiers in British military hospitals. Some of the soldiers experienced cases of hysteria or spasms, and the film was only shown at medical conferences, including one at the Royal Society of Medicine in March 1918 (Jones, 2011, p. 12). The decision to not exhibit all films to the public is similar to how the media responded to the Spanish Flu, as it shares similarities with the “alarming level of self-censorship” that occurred (Shapiro, 2020). The British Government clearly wanted a more positive image of war, as it could lead to potential recruits and at the same time, not instil additional fear in the public. The footage of shell-shocked war casualties in

War Neuroses Netley, 1917 might be a deterrent to any potential recruit if they were to see the footage for themselves. In fact, several of the films captured on the frontline were staged to provide an illusion of reality (Sanders and Taylor, 1982, p. 155). For instance, even though footage showed wounded soldiers, it was “accompanied by cheerfulness,” and “only allied troops and victories” were exhibited in cinemas, which all helped to present the war more positively and promote patriotism. But it was not only the footage of war that was presented this way, but the type of feature films being released in cinemas too.

In 1916, the War Office released the documentary film *The Battle of the Somme*, which featured a combination of “authentic footage and faked sequences” to present the war to audiences as truthfully as it could (Reeves, 1997, p. 7). Modris Eksteins wrote that “most films made during the war trivialised [it with] melodrama or adventure,” whereas *The Battle of the Somme* sets out to tell the truth about the war, by showing real moments and faking other key sequences (1989). This meant that audiences did not know what depiction of the war was real and what was staged, which ultimately presented the film as a piece of propaganda. Furthermore, as the film was released by the War Office, it suggests that the public might take its entirety as fact, as at the time, there were limited ways of accessing and obtaining knowledge and information, which again further relates to the idea of post-truth. The documentary did not shy away from presenting the reality of the situation, as it was “the first time that a film showed the horror of the war” as it included scenes showing “dead [casualties] on the battlefield” and other “vilenesses of war” (Reeves, 1997, pp. 8-21). *The Battle of the Somme* arguably marked the first accurate depiction of the First World War, and British audiences could see for themselves the situations and conditions that their loved ones were enduring on the battlefield, which ultimately led to great success for the film. It is believed that during its initial six-week theatrical run “1 million Londoners and 19 million nationwide” saw the film (Reeves, 1997, p. 8). Cinemas, at the time, were often thought to be for lower-class entertainment, but *The Battle of the Somme* also “attracted more middle-class audiences” (Reeves, 1986, p. 14), some of whom “had never been to a cinema before”. The film also had a longer run than usual, and by October 1916, was showing in “more than two thousand cinemas” around the country and grossing over £30,000, which adjusted for inflation is over £2.5 million today (Reeves, 1986, p. 472). Whilst there is no accessible box office data surrounding other 1916 film releases in British cinemas, in 2004, the BFI published a list that charted the Top 50 films of the 20th century that generated the most admissions. *The Battle of the Somme* generated over 20 million admissions, at a time when the British population was a little under 40 million, and to this day, only *Snow White and the Seven Dwarfs* (1937, Hand et al., USA), *Gone with the Wind* (1939, Mitchell, USA), *The Sound of Music* (1965, Wise, USA) have ever generated more in the UK. In the twenty-first century, the BFI have not regularly tracked or provided data for cinema

admissions, and instead rely on box office statistics. In an article in the *Evening Mail*, the author wrote that the “crowded audiences were interested and thrilled” to see the realities of war and that audiences at home had the right “to have a glimpse of what soldiers [were] daring and suffering” (1916, p. 2). While allowing audiences to see the war for themselves might have contributed to the film’s success, *The Battle of the Somme* paved the way for more war films to follow. Following *The Battle of the Somme*, other similar films depicting the war with a combination of real and staged footage were released, such as *The King Visits his Armies in the Great Advance* (1916, Malins, UK) and *The Battle of Ancre* (1917, Malins, UK). Furthermore, in order to continue efforts to boost morale and avoid any depressing effect of real war footage, the War Office invited American filmmaker D.W. Griffith to make *Hearts of the World* (1918, USA) after his dramatic work in the now-controversial film *The Birth of a Nation* (1915, USA).

However, coinciding with this time was a rapid rise in cases of influenza globally, and yet, movies about influenza were nowhere near as present as movies about the war, which remained within cinema beyond the First World War in 1918. Michael Paris writes, “between 1919 and 1939 [there were] more than thirty major feature films” made by British studios that centred on the war, with “Hollywood producing three times” more (2012, p. 62). Films released in this period, such as *The Big Parade* (1925, Vidor, USA), tended to feature the war as a backdrop, focussing more on the stories of individuals, whereas in the years that followed, changing public attitudes meant a change in the type of films produced. Soon after the war, British audiences saw war films as “a form of commemoration” and used them to “justify the loss” of life that came as a result of it, as fallen soldiers could be immortalised in film and therefore in the memory of audiences (Paris, 2012, p. 62). Paris continues that a decade later British people turned against the war for achieving nothing but the death of a generation, leading to anti-war frustrations and attitudes within society. This would eventually influence the films being produced, with one of the most notable examples being Milestone’s *All Quiet on the Western Front* (1930, USA), as it “never gloss[es] over” any aspect of war, but instead “exhibited war as [the] butchery” that it was (Kelly, 1997, p. 39).

The relationship between the First World War and cinema changed throughout the years, and the attitudes of the public changed with it. Andrew Kelly writes that films went from “tools for propaganda” to “reflections of rejections of conflict,” but it was also a window for those at home to look onto the battlefields, as well as a medium to remember the lives lost. War had an important and large role within film and cinema throughout and beyond the first World War, yet the 1918 Influenza, which also claimed the lives of so many, is almost non-existent within the medium (1997, p. 2).

Bryony Dixon writes for the BFI about the presence of Influenza within cinema over a century later, where she states that it is “astonishing to think how invisible the first pandemic in the time of cinema is from the film record” (2020). There is virtually no evidence of the 1918 Influenza on-screen, apart from one informational film, *Dr. Wise on Influenza* (1919, Best, UK). Dixon continues that “there were no newsreel reports [or] fiction films” that even mentioned the 1918 pandemic, despite it claiming the lives of “200,000 people in the country”, and newsreels themselves being a regular source of information for the masses at the time. The loss of British life as a result of influenza is certainly high, so it is interesting that there are no narrative films that cover the topic, especially when compared to the extent of coverage of the First World War. Influenza claimed almost a quarter of the number of British casualties who were killed in action during the war, and more films could have been made to educate and inform throughout the pandemic. Films could have also been made to remember those who passed in the years that followed, in the same way that movies were made about the war.

However, historian Susan Kent argues that the “emotional and mental consequences of unbearable war-related experiences and the enormous loss of life” led to a nation dealing with “post-traumatic stress disorder” (2009, pp. 3-4). Kent continues that the grief shared by the nation almost induced those at home “with the same kind of emotional trauma incurred by men on the battlefield” (2009, pp. 14-15). Therefore, the lack of films about influenza could be due to the nation not being ready to process another cause of mass death at the same time as dealing with the casualties of war. But if war films were a form of commemoration for those who died as a result of it, the lack of films about influenza can also be seen as a lack of commemoration for those who died during the pandemic. On the other hand, the lack of influenza films could also be seen as another example of self-censorship that had already existed within the press and news. Influenza is invisible on film, and it could have been intentional to help the public process the effects of war, without additional worry or stress. Moreover, a health pandemic is not as dramatic or cinematic as the World War, which could factor into why there was only one film about the former, which was an informational film, too. In fact, *Dr. Wise on Influenza* chooses to deal with the pandemic in a way that raises awareness about the horrifying extent of influenza, and at the same time, treats it with a level of self-censorship too.

Dixon notes that *Dr. Wise on Influenza* was “distributed in cinemas during the second wave” of the influenza outbreak in late 1918, and follows the fictional story of Mr. Brown, who “coughs and sneezes over colleagues in the office and the street” (2020). Director Joseph Best shows Mr. Brown as someone who clearly has symptoms of the flu, yet continues to live his life as normal, and in doing so, ends up infecting other individuals around him. Throughout these moments, Best uses text to inform audiences that what Mr. Brown was doing was wrong, such as “Brown suffering from a cold, should have avoided all indoor assemblies,” which allows them to act accordingly in their own lives. Although

Mr. Brown makes a recovery after receiving advice from a doctor, he returns to work to discover that his colleagues are not in, and eventually receives letters stating that they have passed away, and it is inferred that it is a result of him not isolating. Furthermore, Best includes news articles with headlines that read “Influenza Epidemic Spreads: 2000 Deaths Last Week”, which show audiences the deadly impact that the flu is already having on everyday lives. Although dead bodies are never shown in the film, the message of caution is still clear and evident throughout, and the advice that it shares is beneficial to anyone watching at the time, such as wear a mask, “if you feel ill, go home and isolate, keep cheerful [and] wash your hands”. This advice is certainly helpful in reducing the spread of influenza, but at the same time, it is given to maintain high morale within the public. The film shows nurses wearing masks and treating influenza patients at the end of the film and follows it with a handwritten note from Dr. Wise that reads “the influenza epidemic can only be controlled if every person will take immediate precaution against infecting others.” This suggests that if the public follows the advice and works together then influenza could be treated and patients could recover, but it is this very advice that has connotations of self-censorship. In 1918, *The Times* wrote that “never since the Black Death has a plague swept the world” but at the same time, “never has a plague been so stoically accepted”, which is evident within this film. The informational movie mentions “2000 deaths last week” but chooses not to show any horrifying image of it or any of the side effects, and instead chooses high statistical figures. When influenza is mentioned by anyone on screen who is not Dr. Wise, it is always referred to as “the flu,” in quotation marks, rather than outbreak or epidemic, which has more serious connotations. In addition, the advice given to audiences to maintain morale is almost hoping to achieve the same wartime spirit, but with a new issue to overcome. But while influenza was deadly and took the lives of so many, there were numerous individuals working with modern technologies and sciences to tackle it with methods beyond cheerful spirits.

In *Dr. Wise on Influenza*, one scene shows Mr. Brown standing outside of a cinema amongst a large group of people, where he is coughing and sneezing and therefore likely spreading the virus onto others. *The Kinematograph Weekly* reports that many copies of Best’s film were purchased by the President of the Local Government Board to get the public to assist health officials by adopting caution to combat the disease (1918a, p. 86). But caution was not the only way to combat influenza, as the reality was that many cinema managers adopted new practices and measures to help stop the spread. According to *The Bioscope*, “the influenza epidemic is working havoc in the cinema industry,” as the concern of the virus led to financial losses for cinemas and several other obstacles (1918, p. 6). The government never announced a national “order to close cinemas” during the outbreak, which meant that different cinemas implemented different strategies (Dixon, 2020). For instance, the ABC Cinema in Mansfield, Nottingham, made cinemas “out of bounds” for military personnel and schoolchildren,

essentially banning them to prevent further infections to more essential and vulnerable groups (*The Bioscope*, 1918, p. 6). However, one of the more common strategies implemented across most of the nation's venues was the roll-out of disinfectants and ventilation systems. Several newspapers, such as *The Kinematograph Weekly*, feature advertisements for germicides with notices like "Guard against Influenza! Spray the atmosphere of your cinema several times daily with Jeyes' Fluid. The ideal disinfectant," highlighting the sort of measures which took place (1918b, p. 24). Another advertisement selling germicide sprays and equipment, such as the "Pneumatic Vapouriser" calls for cinemas to show a slide on screen before the film that reads "This theatre is thoroughly disinfected with a germicide which eliminates the danger of Influenza Germs", which can help ease any anxieties that any viewer may have (*The Kinematograph Weekly*, 1918b, p. 100). Local councils, like the Middlesex County Council, even made it "compulsory [for cinemas] to spray antiseptics to prevent the spread of influenza" which although was not an official government order, does highlight how serious community leaders took the virus (*The Kinematograph Weekly*, 1918c, p. 113).

The lack of official government decisions in Britain in regard to the arts during influenza demonstrates a lack of support. As discussed earlier, it took two years of lobbying from 1914-1916 to come to an agreement for filmmakers on the frontline, and 1916's *The Battle of the Somme* brought more middle-class audiences to the cinema in 1916, some of which, for their very first time (Reeves, 1986, p. 14). This suggests that by Influenza's arrival only two years later, cinemas had not quite escaped the association of a lower-class entertainment form yet, and as a result, the government did not take it seriously. If there had been lobbying or calls for support for cinemas amidst the virus in 1918, then the government might have acted in greater accord and implemented official measures for movie theatres. Instead, it was up to local councils and individual theatre owners to act accordingly. Nonetheless, the response to the Spanish Flu was vastly different overseas, as America "declared a state of emergency" and "between 80% and 90% of movie theatres were closed for anywhere between two [and] six months" (Andreeva, 2020). Nellie Andreeva continues that there was a "ban on filming crowd scenes and studios shut down for a month" during the second outbreak. The impact of influenza on the film industry was significant, as it was the first health pandemic to disrupt the exhibition industries on a global scale. Whilst it was also the first pandemic to occur in cinema's existence, it also coincided with the arrival of modern science and apparatus, such as germicides and chemical disinfectants, which, as Barry notes, was initially met with restraint from certain members of society, who would "simply call upon divine intervention to save themselves" from the virus (2004, p. 5). Laura Spinney writes that when Influenza vaccines were introduced, some "people balked at the idea that they could be protected against a disease by being injected with it," and it is this sentiment of rejection that would be apparent in future introductions of science, medicine, and technology

(2017, pp. 25-26). Eventually, society's "immune systems adjusted" to the virus and death counts reduced in the 1920s until it eventually faded away (Barry, 2004, p. 391). Although the impact of the virus remained within society, its legacy was essentially invisible in the years that followed.

In conclusion, influenza had a massive impact on the early 20th century and yet its presence is almost absent in film and cinema. The only film about influenza was the informational, *Dr. Wise on Influenza*, and even that exhibited examples of censorship and downplaying that dominated the print and media industries. Britain was going through a time of enormous loss during the emergence of influenza, and decisions to censor news about influenza were made to maintain high morale in the nation, but by doing so, it left the fallen "200,000 people in the country" without any film that remembers their legacy (Dixon, 2020). Furthermore, the emergence of influenza allowed for a period of scientific discovery and for new practices to be introduced. In cinemas, the use of germicides and ventilation systems became the norm in combatting the virus at the time, which helps to contrast with the systems and regulations put in place for the Coronavirus a century later.

Influenza was the first global health pandemic in cinema's lifetime, and while world wars also impacted cinema, it would be over a century later for another pandemic to arrive and disrupt the film industry. Whilst cinemas were hit by a pandemic in a similar way in both 1918 and 2020, in 1918, it was largely unaffected by the virus. Movie theatres were not closed in 1918, as a result of government indifference to cinemas, which were viewed as working class entertainment, and most of the response to the virus relied on the individual rather than group action. But at the time, cinemas remained virtually the only way for audiences to watch movies. What is crucial to understanding the impact of the 2020 pandemic is to understand how the landscape had changed in the intervening century. By the time of Covid's arrival, cinemas were no longer the only place to see films, which had been the case in 1918. There had been numerous technological introductions and paradigm shifts that had occurred within the industry that not only challenged the primacy of cinemas as a means to see films but created an entirely new context for a similar set of problems.

The following chapters examine significant turning points from cinema's history, sandwiched between two pandemics in 1918 and 2020, that also impacted the modern film industry, and shaped the relationships between audiences, studios, and theatre owners.

Chapter 2:

The Change to Digital Projection and Distribution

Following on from the 1918 Influenza was a series of technological developments that lead up to the moment of Covid's arrival over one hundred years later. These developments move the aesthetics of cinema forward with an intersection between narrative and spectacle. Tom Gunning wrote about the cinema of attractions, which "solicits pleasure to viewers through an exciting spectacle," with a focus on theatres between 1907 and 1913 and saw that the "narrativization of the cinema" allowed audiences to engage in both story and character (1984, pp. 384-386). Narrative and spectacle have remained two key forces at the heart of cinema, and evident through decades of technological advancement and innovation. The introduction of sound in 1927 added realism to cinema, and the use of colour further added to the spectacle of cinema. Whilst sound and colour were quickly adopted as the norm in storytelling, demonstrating how technological innovations have been accepted in the industry, widescreen was a technical format introduced in the 1950s that not only emphasised the spectacle of cinema, but combatted the growing appeal of television as an additional method of movie watching.

This chapter will start by exploring the introductions of sound, colour, and widescreen and their impact on the exhibition industries. These formats have allowed audiences to immerse themselves more in stories and character, and at the same time, allowed studios and theatres to entice viewers with new spectacles and theatrical aesthetics. As technology continued to develop in the subsequent decades, it leads to arguably the most significant development since widescreen - the eventual transition from celluloid film to digital at the start of the 21st century. John Belton defined digital cinema in 2012 as "more than digital motion picture imaging, special effects or editing", but rather the overall "digitisation of each aspect" of the filmmaking process, making it more accessible and easier, too (p. 187). Moreover, economic, and innovative factors meant that the arrival of digital cinema within the film industry was gradual, coming decades earlier to processes like special effects and video-editing than it did to filming and distribution.

This chapter will focus on digital's gradual arrival and then impact on the exhibition and distribution industries. Whilst digital has also paved the way for streaming and online viewing, which will form the discussion in the following chapter, it has also led to emerging technical formats like IMAX and 3D that further emphasise the spectacle of cinema, challenge theatrical aesthetics, and combat the appeal of additional markets. This discussion will be an analysis of how the industry has responded

to these introductions, how audiences have received them, and how it has impacted the relationship and power balance between studios and movie theatres.

In 1927, Warner Bros. released *The Jazz Singer* (Crosland, USA), the first feature-length movie released with sound, noted as a talkie. Crafton notes that although the studio “took a chance on a new process” it eventually turned out to be a “box-office gold mine that made over two million dollars”, which is around \$35 million when adjusted for inflation, and essentially marked the end of the silent picture (1997, pp. 1-2). Developing alongside sound technologies like the Vitaphone, which *The Jazz Singer* used, were innovations within colour cinema. Early examples of colour film featured additive colour processes between 1906 and 1922, followed by subtractive colour processes until 1928, which “did not absorb light the way additive processes did, therefore producing brighter pictures” (Street, 2010, pp. 429-431). However, it was the innovation of three-strip Technicolour, which was introduced in 1932 and involved “recording blue, red and green images on a single film strip” that went on to become the industry standard (Street, 2010, pp. 440-441). The technology was popularised by the release of *The Wizard of Oz* (1939, Fleming, USA) and its creative decision to film the Oz sequences in colour. The film features a colour switch from sepia Kansas scenes to the colourful Oz, which function as a visual spectacle for audiences. Sarah Street notes that the on-screen transitions to colour were “non-jarring to make the switch easy on the eye,” yet the audiences remained intrigued at the transitional devices, and the notion of “seeing black-and-white characters come to life as tinted flesh.” Whilst the potential of what the technology could offer was evident with *The Wizard of Oz*, its use in the film industry would be gradual, as Belton notes only 2.6% of films were colour in 1938 but climbed to 18% by 1949, before only becoming the norm in the 1960s (1992, p. 66). In addition, Belton argues that while both of these technical formats help to emphasise the “greater spectacle” that cinema has to offer, it is the introduction of widescreen cinema that truly “transform[ed] the face of cinema” by “establishing a new set of technological and aesthetic norms” (1992, p. 12).

Widescreen cinema is when the “width of a projected [film] is greater than its height” and between 1952 to 1954, “dozens of widescreen processes were unveiled to the motion picture industry (Belton, 1992, pp. 12-14). Steve Neale and Sheldon Hall note that around this time the industry was conflicted with this new form, but processes like CinemaScope were introduced and designed to “satisfy the marketplace within existing exhibition standards and practices” (2010, pp. 148-149). CinemaScope differed from Cinerama, which used three cameras synchronised together to capture a wider image, and three projectors to project it on special, wider screens, whereas CinemaScope used anamorphic lenses on the camera and projector to compress the image horizontally. Whilst CinemaScope was a more cost-effective approach, as exhibitors did not have to resort to additional expenses, early CinemaScope films suffered from “optical distortions and lack of clear focus” (Neale

and Hall, 2010, pp. 148-149). As technology developed, new widescreen processes were also introduced, such as SuperScope, in 1954, which involved attaching a wide-angle lens to projectors and Paramount's VistaVision, also in 1954, which fed 35mm film horizontally through the camera, but this process was critiqued at the time, as "most audiences were apparently unable to distinguish" VistaVision from non-widescreen. Although home viewing will be explored more in the following chapter, television sets have been around for almost a century, and consistent programming has been available since the BBC became "the world's first regular, public, television broadcasting system in November 1936" (Burns, 1998, p. ix). Home televisions became extremely popular, in 1951, 9% of British homes owned a television set and this would grow to 75% in the next decade. As a result, there was an audience slump in cinema attendance in the early 1950s, and as Belton notes, it was believed at the time that the emerging widescreen technology would be enough to "lure audiences back into the theatre" (1992, pp. 12-14). This emphasises the spectacle of the format being something that can not be achieved with home viewing, and further demonstrates the idea of a cinema of attractions, as it uses the novelty of a new aesthetic experience to further engage audiences in the story. Geoff King and Tanya Krzywinska add that the spectacle of these technological developments is hyperreal and makes everything feel larger than life, which formed a central part of a strategy by studios and cinemas to entice audiences back (2000, pp. 1-2).

Furthermore, larger auditoriums and screens were also being built to accommodate widescreen, which allowed the technology to evolve from a "transitory fad [and] into a permanent fixture" (Belton, 1992, pp. 12-14). Additionally, as Neale and Hall note, widescreen was able to "convert the industry with 13,175 out of 15,783" cinemas in the United States equipped for projection within a few years following its introduction (2010, p. 150). Neale and Hall suggest that the appeal of these widescreen processes lies in "enhancing existing products," which is an idea rooted within technological innovation and developments, and in terms of cinema-going, demonstrates the impact that emerging technologies have on both the viewing experience for audiences and economic benefits for studios and exhibitors (2010, p. 149). This, therefore, makes the transitional period of widescreen cinema extremely pivotal in understanding and contrasting with what would be the next most significant transition within cinema's history, that from celluloid film to digital cinema, which would occur decades later.

Each of the three technical introductions observed, sound, colour, and widescreen, were not instantly adopted by the industry, and were initially met with conflict and scepticism from industry professionals. Sound became the industry standard by 1930, three years after its introduction, and similarly, widescreen was adopted in most US cinemas in its first few years. However, colour was a lot more gradual, as additive processes were first evident in 1906, before popularised with *The Wizard of*

Oz in 1939, and only being adopted as the industry standard in the 1960s. The arrival of digital cinema was also not immediate, and like colour, took a prolonged period to be adopted as the standard. Belton deemed digital cinema as the overall “digitisation of each aspect” of the filmmaking process, demonstrating how digital was incorporated in some filmmaking stages earlier than others (2012, p. 187). Richard Wallace writes that digital was focused on the “automation and mechanisation of previously manual processes,” which links back to the idea of enhancing (2018, p. 8). Although film was never truly manual, and digital does not make certain processes fully automatic, it is enhancing the process by making it more accessible and easier. But unlike sound, colour, and widescreen, whose enhancements benefited audiences on an aesthetic and astonishing level, digital’s enhancements were more aligned with industry professionals, offering cheaper and quicker alternatives. Roger B. Wyatt deems the relationship between digital and technology as the “interactions of multiple contexts, dynamics and actions,” which further demonstrates the desires and decisions to use the emerging technology to both ease previous processes and achieve an end result that was previously not possible (1999, p. 367).

The transition from celluloid film to digital took place at the start of the 21st century and was a significant turning point in the digital movement and would pave the way for the modern film industry. The digital movement aims to enhance previous processes, but at the same time, provide easier and more affordable alternatives for industry professionals. Digital’s integration within the industry was gradual, and Belton adds that it “developed unevenly for thirty years,” emerging first in other fields, like photography, and other stages of the filmmaking process, like post-production (2012, p. 187). Before analysing digital’s impact on the film production, exhibition, and distribution industries at the start of the new millennium, its gradual emergence and acceptance in other sectors can be briefly observed.

One of the earliest emergences of digital technology was in the field of photography. John B. Williams writes that photography has always been a “matter of chemicals,” referring to the light and substances that were required to produce and process an image since its earlier models (2017, pp. 243-245). In the 1930s, sensors became smaller so that they could be incorporated into cameras, and as technology continued to advance, so did the camera, becoming lighter and more flexible in motion. There was also the development of electronically aided photography, such as autofocus in the late 1970s, which used automated tools in film photography to make the workflow more efficient. Furthermore, the late 1980s and early 1990s saw early examples of the digital camera, which differed from film photography with the use of electronic sensors to capture and store images. Digital cameras could also allow for images to be downloaded to a computer without the need for the film to be processed to view the images, and therefore not only made digital cameras commercially viable, but

used emerging technology to enhance previous versions and models. Coinciding with this time, some digital cameras, such as the Sony ProMavica MVC-2000, were also capable of capturing digital video, which would allow video capturing to be more inclusive and accessible. This would extend to the film industry by the early 1990s, and like other technological introductions, would also be met with both optimism and scepticism.

Also occurring in the late 1980s were advancements within film editing, with the invention and roll-out of non-linear editing systems. These systems incorporated “computer platforms and hard disk drives” and revolutionised the editing industry with “tremendous flexibility and speed at the click of a button” (Morris, 1999, p. 12). Non-linear editing allows films to be edited more efficiently too, as any scene can be chosen and viewed digitally, without the need to scrub through the preceding footage to view it, as the previous, linear methods had required. However, as Patrick Morris notes, earlier examples of non-linear systems were met with a level of scepticism and apprehensiveness that was evident in the introductions of the digital camera, and later digital filmmaking processes too. With non-linear editing, “editors transferring to this technology” were concerned with issues such as hard drive space or the loss of image detail on reproduced previews, which had not existed in linear systems, but soon got used to the technology once using it (1999, p. 12). Moreover, Dominic Case states that further advancements in technology throughout the 1990s have “increased data capacity and the speed of processing data,” which has allowed digital previews to “match the resolution of film images” (2001, p. 18). Non-linear editing has now been adopted as the industry norm for film editing, demonstrating how technology has eased and enhanced previous manual processes of filmmaking. However, digital has not only brought new techniques and advancements to analogue methods of filmmaking but has also created new methods to add to the filmmaking process, which have also been gradually adopted throughout cinema’s history, like CGI (Computer-Generated Imagery).

Michele Pierson notes that “digital technologies have not just transformed the filmmaking process at a technical level,” but also in the way that filmmakers “mentally engage with production,” which is evident within the evolution of CGI and special effects (2002, p. 139). Although *Vertigo* (Hitchcock, USA) featured cinema’s first computer animation in 1958 with its opening title sequence, CGI only began to truly emerge in 1973, with *Westworld* (Crichton, USA). In Michael Crichton’s film, Yul Brynner plays an android, and a sequence features his character’s robot vision, shown through “a pixelated POV digitally processed by computer graphics” (de Semlyen, 2010). As technology developed throughout the years that followed, so would the extent of CGI within cinema. Pierson states that “the early to mid-1990s [was] a period where CGI effects became the focus of intense speculations” from audiences and the industry as a whole (2002, p. 137). In these years, films, especially blockbusters, were experimenting with the technology and what potential it could bring to the industry, as even

1995 marked *Toy Story* (1995, Lasseter, USA) becoming the first full-length computer-generated film. It is with this period of experimentation where Pierson highlighted two key principles with the use of special effects, which are the desire to “create photorealistic imagery” and to create a “cinema of astonishment” for audiences, which would further engage the relationship between narrative and spectacle in cinema (2002, pp. 48-49). For instance, 1993 featured computer-generated dinosaurs with “realistic physical textures” in *Jurassic Park* (Spielberg, USA), which juxtaposes the illusion of seeing dinosaurs amongst a cast of humans with the spectacle and excitement of seeing these creatures in a blockbuster on a big screen (de Semlyen, 2010). This again links to Gunning’s work surrounding the cinema of attractions, and the use of narrative to solicit pleasure through spectacle, but now, computer-generated elements are showcasing believable and fantastical components to capture the audience's attention and further incite visual curiosity (1986, p. 384). King and Krzywinska note, in reference to *Jurassic Park*, that blending the special effects with narrative elements allows audiences to engage more with the story and characters. For instance, the T-rex in the movie is introduced through various teases from the perspective of the characters, allowing audiences to build relations and emotions through the characters. By the time of the first full view of the T-rex, the audience are already integrated into a narrative space, focusing on the story more than the effects, thus making it feel like a more immersive viewing experience (2000, pp. 43-48). It was these smaller acceptances of digital technology in other filmmaking processes that drew the attention of George Lucas and would ultimately revolutionise the digital movement.

Lucas pioneered the transition to digital, to which he said, in 1999, that “in the twentieth century, cinema was celluloid; the cinema of the twenty-first century will be digital” after his film *Star Wars: Episode I - The Phantom Menace* (1999, USA) was shot using both celluloid and digital technologies (Belton, 2002, p. 104). However, it was only Lucas’ next film, the sequel, *Star Wars: Episode II - Attack of the Clones* (2002, USA), which was revolutionary for digital cinema’s role within the industry, as it became the first major film to be “shot fully on digital video” (Gaut, 2009, pp. 75-76). Berys Gaut adds that Lucas’ decisions to shoot digitally brought the technology to the centre of industry attention and focus, particularly for being “cheaper to produce and distribute than conventional film.” One on hand, filmmaker Francis Ford Coppola shared excitement for a future where “people who normally wouldn’t make movies are [going to] be making them,” as the means of filmmaking became more accessible (Wyatt, 1999, p. 374). But on the other hand, some industry professionals remained concerned with digital, worried about the effect it might have on the traditional processes that existed beforehand, and whether they would become “a historical curiosity in the years to come” (Murch, 1999). In addition, Lucas used these films to experiment further with

CGI and special effects that continued to develop in the late 1990s, to add fantastical elements that could not be created in previous instalments in the franchise.

Ron Magid notes that *The Phantom Menace* featured nearly 2,000 shots with CGI suggesting that it would be easier to “spot the few hundred shots that don’t feature” any computer-generated work (1999, p. 78). With the prequel trilogy, Lucas capitalised on emerging technologies where he could, featuring scenes where “actors move before a blue screen, miming interactions with characters that will be added later” in order to craft his vision (Pierson, 2002, p. 151). However, when Lucas made the first instalment in 1977, *Star Wars [Episode IV - A New Hope]* (USA), the technology around was just a few years on from that which was used in *Westworld*, so the use of CGI was limited. *A New Hope* mainly uses practical sets, puppetry, and other special effects to tell the story, but it does feature a computer-animated film of the attack plan on the Death Star that is viewed by rebel pilots, which Lucas hired Larry Cuba, a computer-animation artist, to create (Price, 2013). As Price continues, Cuba was concerned with the level of technology at the time, as the graphics “were supposed to look like the computer graphics of an advanced society, but an advanced society wouldn’t have computers” from the 1970s. This left Cuba to wonder what CGI would look like in the future, to which he resulted would be photorealistic and indistinguishable from photographs. This ties back to Pierson’s principles as when CGI advanced alongside developing technology, it meant the level of the effects could be enhanced from previous versions, therefore creating imagery that looked more realistic and could help to further engage audiences within the story without being distracted by poor special effects (2002, pp. 48-49). But as technology progressed even further, so would the desires of what would be possible. For instance, Lucas’s fascination with the medium allowed him to establish his company, Industrial Light and Magic, which helped to pioneer effects like motion capture, which allows technology to capture an actor’s root performance and translate it into a digital character (Sharf, 2021). Lucas even re-released his original *Star Wars* trilogy (1977-1983) in 1997 as a Special Edition remaster, with added digital effects that could not be achieved at the time of production, such as additional CGI creatures in various scenes. Although the new effects were met with “scrutiny and public debate” it also increased the “speculation about the aesthetic possibilities of CGI” (Pierson, 2002, p. 96).

In the years following Lucas’ *Star Wars* prequel trilogy, CGI has also expanded beyond science-fiction and even the blockbuster, too. For instance, CGI has been used to de-age characters, as done for the protagonists in *The Irishman* (2019, Scorsese, USA) or even to fill in the skyline of an apartment scene that was filmed in front of a green screen. Lucas may have showed the potential of what digital technology could do at the start of the millennium, in both how films are shot and the use of special effects, but it also created a discourse between the two formats.

The discourse between celluloid film and digital cinema is one that remains prevalent amongst industry professionals to this day, with contemporary filmmakers like Christopher Nolan continuing to shoot on film, as well as reiterating early concerns by advocating for the preservation of film stock, stating that “the knowledge [from projectionists and technicians] needs to be handed down” to younger generations to preserve certain practices (Pathak, 2018). On the other hand, early digital projections were praised for their “sharp, bright and pleasing images” allowing other filmmakers to see the potential that digital technology offers and therefore adopt it in their work (McCarthy, 1999). For instance, Steven Soderbergh shot his earlier work on celluloid film stock, such as *Erin Brockovich* (2000, USA), but as digital emerged he began to “experiment with digital cinematography” with his 2002 film *Full Frontal* (USA) and continued to with the digital developments that would occur later on in his career, such as 2018’s *Unsane* (USA), which was shot on an iPhone (Kohn, 2018). Soderbergh states that digital is the future and that at the end of the day, audiences who do not know about a title’s development will “have no idea that [a film] was shot on a phone, [as it] is not part of the conceit” (Kohn, 2018). Both celluloid and digital offer filmmakers a way of sharing their stories, but both filmmaking formats come with their own benefits and drawbacks, surrounding image quality, distribution, and cost, which have been apparent since the transitional period at the start of the millennium.

In the early 2000s, celluloid was believed to offer a better-quality image with more accurate colours due to its processing, as well as an overall higher resolution, as Roger Dettmer writes that celluloid “offers a resolution of two thousand lines”, whereas early digital cinemas used “a [lower] screen resolution of 1280 x 1024” lines at the time (2003, pp. 47-49). However, the processing of film is also its own disadvantage, as celluloid can not reliably replicate the best possible quality in the digital era, meaning that the practical on-screen resolution of celluloid is between 900 and 2000” lines of resolution (Dettmer, 2003, pp. 48-50). Dettmer continues that with celluloid, each cinema requires its own print of the film, which costs around \$1500 to produce, but on the other hand, for digital films, cinemas just “require a server to hold the [movie] file,” thus reducing costs drastically. Moreover, digital technology also has greater longevity. Whilst there is a small chance of a digital file getting corrupted, they do not degrade over time as film prints do. At the same time, “colours can calibrate perfectly to what the creator of the movie wanted,” highlighting the technological ability to present the visually same film across multiple cinemas. (Dettmer, 2003, pp. 49-50).

Although celluloid and digital are often pitted against each other, it is also important to note that the advancement of technology has changed the analogue filmmaking process too, as the processing of film was “done in the digital domain” at the start of the millennium (Dettmer, 2003, p. 48). It is even more apparent in the contemporary industry, with Nolan stating that his films “use

massive amounts of digital technology,” despite being shot on film (Pathak, 2018). Charles S. Swartz writes that in the early 2000s, there was little doubt in the industry that “the post-production process will become digital”, and its “adoption will be as rapid as any technology adoption in motion picture history” (2005, p. 50). The economic benefits and easing of processes have certainly paved the way for digital’s role in the modern film industry. Whilst Lucas used CGI and digital filming for the *Star Wars* prequel trilogy, it also marked the roll-out of digital distribution and projection within cinemas, which has become the most significant transition of digital cinema. But was this accepted rapidly as the post-production industries, or more gradually, thus maintaining the discourse?

The Phantom Menace was released digitally on four screens before Lucas went on to shoot the sequel, *Attack of the Clones*, entirely digitally (Stroud, 1999). Michael Stroud continues that “all-digital productions are the most economical solution in the long run,” as they ultimately save the costs of printing film negatives, shipping canisters and maintaining projectors. For instance, James Korris and Michael Macedonia note that the cost to install a digital projection system in a theatre was \$150,000, whereas film projectors were no more than \$25,000 and likely to last 50 years (2002, pp. 96-97). But as established, with physical film prints costing around \$1,500 each, it meant that digital would work out more cost-effective, allowing cinemas to save in the years following installation. However, despite Lucas bringing digital projection to greater attention within the industry, its initial adoption was still met with resistance, especially with surrounding news of already developing replacements for digital projectors at cheaper prices of around \$2,500 and using different technologies, like laser projection. This therefore made its initial adoption slow and gradual throughout the 2000s, as some cinemas were willing to wait before making the transition to digital (Korris and Macedonia, 2002, p. 97). By the start of the 2020s, digital projector expenses have reduced even further, costing movie theatres between \$700 and \$1,200 for cinema-grade projectors, as well as other maintenance costs, such as replacing xenon bulbs, which can cost between \$450 and \$2000 (Welk, 2023). Nevertheless, despite the gradual roll-out of digital distribution, digital technologies were already being used in various post-production processes that demonstrated the very possibilities of digital distribution.

With the development of broadband and high-security drives, it became common for “high-resolution dailies, effects and shots” to be transported digitally to post-production studios across the world (Korris and Macedonia, 2002, p. 96). This further demonstrates how digital technology was changing the way that films were being made, but it would also change the way that they were viewed by audiences, too. Despite the cost of projection installations, some industry professionals, specifically in the United Kingdom, welcomed the transition early on. In 2005, the UK Film Council awarded an £11.5 million contract to Arts Alliance Digital Cinema (AADC) to set up a network of 250 digital screens in the country (Young, 2005). As Ian Young continues, “high-definition projectors and computer

servers” were to be installed nationwide to help ease the “access to specialised film, [which were] currently restricted” to major British cities. This shows how digital distribution has made film exhibition more accessible, by not just offering a larger variety of titles, but by allowing subtitles and audio descriptions to be available in venues in smaller towns and cities, too. However, the fact that the UK Film Council awarded a contract to the AADC demonstrates reluctance within the industry, as they were unable to implement it themselves. Although the new 250 digital screens doubled the world’s total count at the time, it does further highlight the slow and gradual adoption. It was only in 2011 when the number of digital screens in the United Kingdom was greater than analogue projected screens, as a report by the BFI shows that digital screens accounted for 37.8% in 2010 but grew to 71% of UK screens in 2011 (BFI, 2019b, pp. 25-26). In fact, by 2014 nearly every UK screen was capable of digital projection. The gradual adoption was also apparent in America, where by 2012 the number of digital projectors surpassed that of 35mm, with “nearly 90,000 theatres converted to digital,” which would later progress to 98% of all US screens” by 2016, with the number growing even further, which helps to demonstrate the industry’s acceptance of digital (Grant and Meadows, 2016, pp. 131-134).

The adoption of digital distribution may have been gradual, but in the decade since the AADC set up the first 250 digital screens in the United Kingdom, it has positioned itself as the new industry norm globally. Throughout this decade, technology has also developed and would impact digital distribution further, by introducing new technological viewing experiences, like 3D, as well as modernised pre-existing formats, like IMAX, a larger screen format. In fact, just as Belton noted that widescreen followed on from the introductions of sound and colour to change the aesthetic of the movie theatre and emphasise the spectacle of cinema, emerging formats like IMAX and 3D are extending on from the digital movement to re-emphasise the spectacle of digital cinema, and a greater immersive viewing experience for audiences (1992, p. 12).

Joseph Williams notes that immersion has been used as a term to describe a figurative involvement in a new experience, condition, or culture, for centuries (2022a, pp. 2-3). However, the development of technology in the 1990s has meant that the word has reintroduced itself to be associated with emerging technological experiences, ranging from sound, video, and gaming to even more contemporary movements, such as virtual reality. In terms of cinema, Matthew Lombard and Theresa Ditton note that immersion differs from a subjective experience, and instead can be attributed to “spatial immersion,” which shuts out an individual from the physical environment around them (1997, p. 2). They continue that this not only includes regular theatres and IMAX screens but also simulation roller coaster rides. Moreover, Thomas Bjorner et al. note that film immersion can be defined by the sensory information that the technology is providing to an audience member, as a study exploring 3D and 2D viewing experiences found a significant increase in the heart rate during emotive

scenes of a 3D condition (2016, pp. 101-117). Immersive viewing formats like 3D and IMAX have shaped the contemporary exhibition climate, but in order to truly understand them, it is important to examine where they have emerged from.

The technology for IMAX emerged from film experiments at the 1967 Expo in Montreal, before being adopted by museum sites in the following decades (Acland, 1998, pp. 429-431). As Charles R. Acland continues, the technology operates by using “70mm film stock and turning it on its side” to produce an image that is “eight storeys high and thirty meters wide”, therefore making it ten times the size of a 35mm projection. IMAX shares similarities with the widescreen cinema movement, in the sense that it emphasises the spectacle of movie-going. For instance, as widescreen made films wider, IMAX made them giant and capable of filling “a viewer’s entire peripheral vision to enhance the sense of presence in the scene” being projected (Seel, 2016, p. 102). This made the technology extremely popular in museums, which would show educational and documentary films, such as *Blue Planet* (1990, Burt, USA) and *Africa: The Serengeti* (1994, Casey, USA), allowing audiences to discover parts of the world through a large screen. Acland notes that in the 1990s ordinary cinemagoers were “accustomed to celluloid scratches, dirty or dim projections and focus problems”, but with IMAX, these images constantly featured “astonishingly vibrant colours and fine details”, which helped increase the quality of the image, and therefore enhance pre-existing methods (1998, p. 429). In fact, by 1994, “museum sites accounted for 59% of all IMAX theatres” with the remaining locations in shopping malls and leisure parks (Acland, 1998, p. 432). Although IMAX originated with the projections of educational films, it became a novelty and attraction that movie-goers travelled specifically to seek out. It strikes similarities with Gunning’s cinema of attractions, as the format was used to “solicit pleasure to viewers through an exciting spectacle” (1986, p. 385). But much like the period of early cinema between 1907 and 1913, which Gunning observed, IMAX would also evolve beyond a novelty and attraction, and integrate the narrativization of cinema, to a new form and a new spectacle.

One of the first feature films to be released in IMAX was a digitally remastered release of *Apollo 13* (1995, Howard, USA) in 2002. This brought a greater and more immersive viewing experience to the film, which allegedly made some audiences “let out an audible gasp as the spacecraft broke away from the launchpad, [for] being so real and close” (Thierne, 2002, p. 134). This strikes similarities with the myth of audiences reacting to *Arrival of a Train at La Ciotat Station* over a century beforehand, but also demonstrates how cinema continues to “solicit spectator attention and incite visual curiosity” (Gunning, 1986, p. 384). In 2008, IMAX would expand locations drastically with the introduction of Digital IMAX projectors, which provided a low-cost alternative. Paul Bond and Carolyn Giardina note that a print of a 2D IMAX film costs \$22,000, whereas a digital file on a hard drive was just \$800 (2008). Moreover, digital IMAX screens could be converted from traditional multiplex screens, which although

did not offer as large a screen, still had enhanced audio and visual quality, and more importantly, allowed the format to be more accessible worldwide. When Bond and Giardina reported in 2008, IMAX had just 297 theatres in forty countries, but in the decade following their report, IMAX had expanded to 1302 movie theatres in 75 countries across the world. Furthermore, developing technology has also allowed more films to be shot either partially or fully with either IMAX digital or film cameras, but the movies exhibited in cinemas remain predominantly blockbusters. By releasing popular titles in this format, it not only generates more revenues for studios and theatre owners, but makes audiences want to seek out the viewing experience specifically, thus maintaining the initial element of attraction that IMAX had within museum spaces in the 1990s. The only difference being a more accessible nature that goes beyond the novelty, which contributes to its success as a popular viewing format today.

Parallel to the adoption of IMAX as an immersive viewing experience within the exhibition industries has been 3D, which is another format that has used developing technology to change the movie-going experience, as well as the aesthetics of the cinema. However, the longevity of this format differed drastically from IMAX.

3D has existed in various forms within technology, as Belton notes it has been around “since stereo photography in 1838 and was pioneered in motion pictures in the 1890s” (2012, p. 190). Moreover, the 1950s were deemed the ‘golden era’ of 3D with the release of colour stereoscopic features that were popularised for their novelty effect in films like *House of Wax* (1953, DeToth, USA). As technology developed, so did enhancements within 3D. In the late-1980s to early-1990s, as IMAX continued to grow, they began to produce IMAX 3D content, which projects two images onto the screen and through the use of linearly polarised glasses, converts light beams into a single 3D image to mathematical correctness (Har-Even, 2021). Early IMAX 3D releases were exclusively animated, including family films *The Ant Bully* (2006, Davis, USA) and *Open Season* (Allers and Culton, 2006, USA), as well as the fantasy film *Beowulf* (2007, Zemeckis, USA). In 2008, *U2 3D* (Owens and Pellington, USA), a concert film, was the first live-action digital 3D release, including IMAX 3D. The film’s trailer proclaims that “everything you know is in 3D” but this concert film will let you “see, feel, hear, experience” and now, thanks to 3D, “know” the band. Furthermore, it presents the film as an event, and much like the cinema of attractions, a reason to go out and seek it for yourself. But 3D’s impact on cinema emerged after this, as like regular IMAX, it would focus on the narrativization of cinema, with the release of James Cameron’s *Avatar* (USA) in 2009.

Avatar was released using digital 3D, which Belton notes as the film industry’s “attempt to artificially manufacture a novelty phase for digital cinema,” just as other forms of 3D and early museum-based IMAX had been novelties and attractions within previous moments of cinema’s history

(2012, pp. 190-192). Belton continues that digital 3D “finally offered something that audiences could not get at home or at conventional movie theatres”, with an immersive technical experience that increased the spectacle of cinema. Industry professionals also saw the benefits of 3D, with James Cameron stating that “digital 3D offers an opportunity to do something as profound for today’s audiences as the introduction of colour and sound” (in Belton, 2012, p. 191). But like many of digital’s technical introductions, digital 3D also arrived with a gradual roll-out, following animated releases like *Chicken Little* (2005, Dindal, USA), which was released in 3D in only 2% of theatres that showed the film, as well as *U2 3D* in 2008. By the time of *Avatar*’s 2009 release, 3D had expanded to even more cinemas globally and allowed the film to “gross 70% more in 3D than 2D” during its opening weekend (Belton, 2012, p. 191). *Avatar* went on to become the highest-grossing film of all time, and although this achievement is examined in greater detail in Chapter 4, its success is partly attributed to 3D as it “boosts the overall revenue by 20%” (Belton, 2012, p. 191). Promotional material and television adverts for *Avatar* ended with the phrase “enter the world in [then crossfades between] IMAX 3D, digital 3D, theatres everywhere”, which not only emphasises and immersive viewing experience, but the differentiation between the viewing formats suggests different viewing experiences as a whole, with IMAX and digital 3D being more special than a regular viewing. This differentiation also highlights a shift in the desire of developing digital technology, away from Pierson’s principles of realism and astonishment (*U2 3D*), to focus more on the latter, the spectacle, experience, and wonder of what can be possible. This is evident in the film’s success, which saw the roll-out of 3D screens worldwide, with studios responding by “collectively shelling out \$700 million to help equip theatres” with 3D projectors (Grant and Meadows, 2016, p. 134). Although this can be seen as a financial incentive for studios, it does suggest a desire to promote this new viewing experience to larger audiences too.

However, despite the large number of screens, “the public appetite for 3D waned” and attendance numbers eventually decreased by 2017 (Har-Even, 2021). Films that were not shot using 3D technology and were converted in post-production made some believe that “3D has been subsumed by moneymaking gimmickry [that made] some movies worse” (Grant and Meadows, 2016, p. 134). Digital 3D may have increased the immersion between audience and image, as Bjorner et al. note that 3D viewings increased the heart rate in audiences compared to the same scene in 2D (2016, pp. 101-117). But overall, its popularity was confined to a brief moment in cinema’s history, and it has proven to be a short-lived trend.

Furthermore, although both IMAX and 3D have changed the way audiences interact with film, the impact that 3D has had on a film’s quality has also been a damaging factor on the legacy of digital cinema. Amid digital 3D’s popularity following *Avatar* was a growing negative critique surrounding its effect on a film’s image. As Belton notes, digital 3D projectors ran on “one projector at 144 frames per

second, sending 72 to each eye”, which reduced the light projected to each eye by half and therefore produced a darker and dim image that looked as if “a dirty sheet [was] over the lens” (2012, pp. 191-192). In 2011, Paramount announced that it “would enhance the brightness” of prints of their upcoming 3D titles to improve the quality of their image. However, this was not such a simple solution, as when studios converted upcoming blockbusters to capitalise on 3D ticket sales, the actual process of conversion resulted in additional light loss (Belton, 2012, p. 192). This demonstrates an almost self-sabotaging effect that digital 3D has had on the very concept of digital cinema, which from its early introductions, has always aimed to ease processes and enhance image quality, but instead had the direct opposite result. Digital 3D marks a time when films shown in 3D and 2D had a visible difference, with the former reducing the quality of the original image, whereas other movements, such as widescreen, digital and celluloid projections, and IMAX, have never purposely projected visual differences between cinema showings beyond aspect ratios. Whilst Bjorner et al. defined film immersion as the sensory information that the technology provides, in this case, the technology of 3D glasses and projectors were reducing the quality of the image, which ultimately took audiences away from a truly immersive experience, and the overall spectacle of cinema (2016, pp. 101-117).

However, despite their technical result, both digital 3D and IMAX were viewing formats that shared the desire to change the movie-going experience and entice audiences. For instance, Aylish Wood writes about how digital technologies have “shaped the cinematic space for audiences,” by examining the use of 3D in *Hugo* (2011, Scorsese, USA) and IMAX in *The Dark Knight* (2008, Nolan, USA) (2013, pp. 1-4). In *Hugo*, Scorsese uses 3D to “emphasise the creation of cinematic space” by using “depth at the heart of 3D imagery” to create images with distinctive spaces that feel immersive to audiences. On the other hand, *The Dark Knight*’s use of IMAX also created an enhanced immersive experience, with particular shots filmed using specialised cameras that place audiences in “ambiguous viewing positions” that “bring them straight into the action, [with] no choice [but] to sit back and enjoy” (Wood, 2013, p. 9). Although, the overall effects that these different viewing formats, as well as others introduced later, like 4DX, had on movie-going will be explored later in the chapter “Cinema Vs Streaming”, Wood’s essay does help to demonstrate that when digital technology is used correctly and with thought, it truly creates a unique and immersive viewing experience. Moreover, August Grant and Jennifer Meadows note that although *Hugo*’s use of 3D was technically well crafted, the main learning point is that “3D must assume the role of supporting element and enabler of an outstanding story” (2016, p. 137). It further relates to King’s discussion of *Jurassic Park*, where special effects and spectacle are benefited by narrative structures, as it allows moments to feel more believable (2000, pp. 43-48). Moreover, while *Hugo*’s 3D projections would have had reduced brightness and lower picture quality compared to the 2D showings, both formats still presented an acclaimed film. It also

relates to the cinema of attractions, as if audiences are coming for the narrativization, the technological elements of 3D and IMAX should be what solicits pleasure through spectacle (Gunning, 1984, pp. 384-386).

On the other hand, Hollywood's insistence to convert movies that were not produced with 3D in mind to the format for financial gain turned this technical process into a "moneymaking gimmickry" and ultimately led to the public losing interest in the format (Grant and Meadows, 2016, p. 134). Belton calls 3D an "avant-garde technology," as filmmakers, like Cameron with *Avatar* and Scorsese with *Hugo*, have experimented with the format to break the technical norms of viewership and create an immersive experience, but instead, its over-saturated use has been more intrusive (2012, p. 194). The decline of 3D is evident in the box office. According to the BFI statistical yearbooks, 3D ticket sales accounted for 24% of the annual UK box office in 2010, but in 2018, this would account for just 3% (2019). Whilst celluloid projection also declined, it was because digital proved to be an economically viable method that was accepted by the industry, and then audiences. 3D's decline demonstrates the opposite, a rejection from the industry and from audiences, and as a result, 3D showings of films are significantly less common than they were in the early 2010s.

The technological advancements that digital cinema brought allowed for the "automation and mechanisation of previously manual processes" that have been successful in easing various stages of film production, enhancing previous filmmaking methods, as well as the movie-going experience (Wallace, 2018, p. 8). Digital has also allowed cinema to be more diverse and global, making both films and filmmaking more accessible, but it has also impacted the livelihoods of cinema projectionists. As Wallace notes the transition from celluloid projections to digital marked a "period of change that resulted in the removal of the projectionist as a central figure in cinema exhibition", as the previously manual jobs of film handling and projector maintenance, which ensure a smooth running of shows, were replaced with "digital cinema packages on hard drives" capable of doing the same job (2018, pp. 7-8). Moreover, as Lucas pioneered the use of digital technology with *Attack of the Clones*, Wallace notes that the same period in "the early 2000s was a turning point" for cinema owners, as digital projection was now key on the agenda at annual Europa Cinemas conferences and it was only a matter of time before the majority of cinemas transitioned (2018, p. 11). To this day, most screens in the United Kingdom are digital, with "digital projectors [themselves being] sealed black boxes that only off-site technicians" can open, whereas two decades ago, Wallace describes the role of the projectionist as "the heart of the job" (Wallace, 2018, p. 23). The automation of mechanical processes might be more cost-effective and part of a revolutionary change that extends beyond cinema, from the computer in workplaces to self-checkout machines in supermarkets. But as the film industry has been focussed on creating a viewing experience that enhances how audiences feel in an auditorium,

the digitisation of projection has almost removed the heart and feeling that resided in the adjacent projection room. The discourse around celluloid and digital film that exists today continues to focus on “the knowledge [from projectionists and technicians being] handed down” to new generations so that the overall transition to digital never truly loses the mechanical backbone it builds upon (Pathak, 2018).

Belton even called digital cinema a false revolution for “merely duplicating the viewing experience” of 35mm, when other previous moments of technical introductions, like sound and colour, aimed to enhance and add something new (2012, p. 188). In addition, there have even been other attempts to utilise digital technology that have intended to add something new to the viewing experience, such as Higher Frame Rate (HFR) with *The Hobbit Trilogy* (2012-2014, Jackson, New Zealand), which doubles the frame rate for more seamless motion. However, HFR did not take off even to a fraction of the level of 3D, which further demonstrates the level of novelty and gimmickry associated with certain developing technologies. The way that aspects of digital cinema have resulted in loss, whether in the removal of projectionists or the reduction in image quality with 3D, is another factor that makes the digital revolution less influential than other moments in cinema’s history. Furthermore, as John Burnett notes, the same “rapid technological change has been a characteristic for the last 200 years, [and] automation [is] only the most recent stage in a continuum of innovation”, it asks the question, what has been the overall impact that the transition to digital has had on the industry, and what legacy does it leave for future cinema innovation? (1994, p. 6).

In conclusion, digital cinema’s ability to automate the previously manual processes that have existed within various stages of the filmmaking process has made for greater ease and accessibility, and at a cost-effective level, allowing film to be global and for everyone. The technological development throughout the years has not been an exclusively automated process, but instead, has sought to go beyond what had initially been possible, particularly in processes like CGI and special effects. When these processes are combined with new viewing formats that have emerged, like IMAX, with enhanced sound and picture quality, it offers a more immersive experience that emphasises the spectacle and astonishment that can incite a notable sensory response, and at the same time, changes the aesthetic conventions of movie-going. However, one of the underlying factors of digital cinema, in addition to developing technology, has been the financial incentive fuelled by studios. On one hand, digital aspects of filmmaking have allowed film to “disperse away from Hollywood” and digital rollouts have made new technical viewing experiences more common globally (Gaut, 2009, pp. 75-76). But when digital cinema has fixated on the use of developing technology for moneymaking gimmickry as seen with the phases of 3D and HFR, the end result can be damaging to the very ideas and aims that digital technology has strived towards, and as a result, can take audiences away from an immersive experience.

Moreover, elements of digital cinema, whether projectors or formats, like IMAX, have always experienced a gradual roll-out and apprehension before reaching a level of industry acceptance, and as technology will undoubtedly continue to develop in the years that follow, there will be new movements that will divide industry professionals and undergo the same gradual acceptance that comes with new and emerging technical processes. Therefore, digital cinema acts as a stepping-stone for what may come in the future, and there is already evidence of what that might be, whether more films be shot using mobile devices, or cinemas roll out 4K projectors, capable of 4000 lines of resolution, to the majority of screens, which, in 2017, “comprises of just 17% of screens worldwide” (Pennington, 2017). Moreover, digital distribution may already be the norm for cinemas, but the advent of streaming using digital distribution to bypass the cinema and release films directly onto subscribers’ devices highlights the potential that digital technology has to continue to change the industry further.

The discussion on streaming continues in the next chapter, examining where it stemmed from and how it impacted the relationship between studios and theatre owners. Streaming uses digital technology and the internet to extend on from other additional markets of home viewing, such as television and physical media. Just as any technical introduction was met with scepticism and restraint, so was streaming, and yet its impact has shaped the industry up until the eventual arrival of the Coronavirus pandemic. The impact of digital cinema is more than the automation of manual processes, but is the cross-section of emerging technology, audience immersion and economic benefits to create what previously could not be possible and make it seem believable, and at the same time enhance the overall viewing experience, to astonish audiences and their visual curiosity.

Chapter 3:

The Advent of Streaming: From Physical Media to Digital Libraries

As digital technology was impacting the distribution and exhibition industries, it also impacted the developments occurring within home media. Television and physical media provided additional methods of movie watching for audiences, but as the internet emerged and technology developed, these formats could “no longer offer the primary alternative to theatrical distribution” (Willis and Wroot, 2017, p. 3). This would ultimately pave the way for streaming to emerge as the new primary alternative to movie-watching outside of the cinema, further marking its significance for when the Coronavirus pandemic would bring the closure of movie theatres in early 2020.

Brooks Barnes writes that streaming has revolutionised “how the world gets its entertainment,” as platforms like Netflix and Amazon Prime are changing the way that audiences can watch the latest films and television series (2019). Streaming offers new programming to its subscribers for a fixed fee and allows them to watch content on numerous devices, in the comfort of their own homes and on the go. However, the advent of streaming is not something that occurred overnight, but rather gradually, evolving and adapting from previous moments within the home media industries, and at the same time, alongside the emerging technological developments that were taking place, too. In recent years, streaming services have utilised algorithms, digital marketing, and other unique user-based features to capture the attention of future audiences, and to cater to the changing attitudes towards film and TV. The previous chapter examined the impact that emerging digital technologies have had on cinema, but since the late 1970s, the home media industry has played an increasingly fundamental role in audiences and viewership, which makes it pivotal to examine the impact that digital has had on home viewings throughout history. This chapter will explore key moments and developments from the home media industries that have provided audiences with an alternative method to watch movies before Chapter 4 explores how multiple markets impacted the relationship between studios and cinemas. Furthermore, before analysing the role of streaming within society today, it is important to look first at where exactly it emerged.

Douglas Gomery notes that it was the “introduction of the Betamax and the VHS” in the 1970s which transformed movie-watching, as these technologies enabled audiences with the freedom to choose whichever film they wanted to watch, without being “dependent on theatre owners or television station programmers” (1992, pp. 276-278). Gomery adds that these home video technologies “add positively to the choices” that audiences have to watch movies, as theatres, pay television and over-the-air television were other formats that still existed, whereas the home video

simply added a new, alternative window. Having new methods of watching films combined with high sales numbers led to the “greatest participation in movie watching” at the time, meaning that home video markets had an important economic role within the industry too, which was quickly exploited (Gomery, 1992, p. 278). The viewing freedom that audiences were experiencing for the first time at home grew extremely popular, as in 1985, a decade since its introduction, VHS “rentals and sales surpassed the theatrical box-office in the United States” (Gomery, 1992, p. 278).

Home video and VHS tapes combined the comfort of home viewing, typically associated with programmed television, with “the box office approach of movie economics” meaning the films which were favoured were those that would lead to more sales or rentals (Gomery, 1992, p. 276). In addition, Paul McDonald writes that “Hollywood was divided with the arrival of video” in the early 1980s, as some embraced it for the new window it was bringing to the industry, whilst others resisted and rejected it, with concerns of “copyright infringement threats” from home recordings (2007, p. 109). When video emerged as the “main revenue stream for Hollywood” towards the end of the 1980s, it did not matter whether industry professionals were for or against it, as the main questions shared by both parties were “how could video be controlled to generate profits and make lucrative revenues?” (McDonald, 2007, p. 109). The introduction of video was already revolutionising the film industry, as Jason E. Squire writes that it operated like “no other part of show business, [but] more like a packaged good business”, as for the first time, Hollywood was actively “manufacturing, warehousing, and distributing physical product” to consumers around the world (2006, pp. 428-429). Moreover, the film industry was very much catered towards profits, and the economic incentives of the new video market led to changes in the way in which films were advertised, too. Gomery writes that films programmed on television were often “geared towards the desires of advertisers”, whereas the sales of VHS tapes were advertised directly to “the desires of the individual fan”, allowing them to personally curate their own programme with what films in a video-store appeal to them (1992, p. 276). Gomery adds that each VCR owner had already invested around \$300 for the machine, so advertising films “for as little as a dollar” per video is a factor that is likely to get more use out of the machine. As technology continued to develop, it paved the way for disc-based formats, such as Videodisc, which emerged alongside videotapes in the mid-70s, to later formats like Laserdisc and DVD, which were able to overhaul the popularity of tapes, and yet the attitudes, approaches and concerns of these formats were similar.

None of these early attempts at disc-based media reached the popularity and combined acceptance that VHS had achieved, until the introduction of DVD. As Jim Taylor writes, DVD emerged from a “long gestation” and desire within Hollywood in the early-to-mid-90s for a “single worldwide standard for digital video”, that CDs had already achieved with music for a decade (2001, p. 45-47). In

1994, seven major studios and entertainment providers formed the Hollywood Digital Video Disc Advisory Group and set out certain requirements that a disc format must meet, which included “room for 135 minutes of film on one side of the disc”, “superior picture quality to other video systems” and “the ability to accommodate three to five languages” to name a few. Furthermore, to protect the copyright of films, Hollywood representatives reached an agreement with the Consumer Electronics Manufacturer’s Association (CEMA) to propose legislation and standards that protected intellectual properties (McDonald, 2007, p. 57). As technology continued to develop, all of these factors were accommodated in time for DVD’s launch in November 1996 in Japan, as discs were made to be encrypted, and offered the highest quality resolution possible at the time, 720 x 480, as opposed to Laserdisc, which offered just 567 x 480 lines of resolution (McDonald, 2007, p. 59). The increased quality of video and sound that DVDs offered consumers was a huge appeal and allowed the format to “capture a popular market quickly” (McDonald, 2007, p. 59). For instance, McDonald continues that in Western Europe, “DVD penetrated 50% of television households” in just six years following its launch, whereas it took videotapes “twelve years to reach [that] level of penetration” (2007, p. 59). Furthermore, DVD was also “cheaper and easier to produce, store and distribute” than videotapes and previous disc formats (Taylor, 2001, p. 8). It also meant that the format was more affordable for consumers, as DVDs were typically purchased and owned, whereas rentals were common for VHS tapes. By 2003, DVD sales overtook VHS rentals for the first time, and just two years later, DVD would bring in \$22 billion in revenue, whereas VHS would pull in just \$1.5 billion (Boucher, 2008). DVD helped to not only popularise home viewings on a greater scale but simultaneously meant that, for the first time, smaller, independent films and foreign titles had a globally and economically viable method of a physical home release, which would diversify the types of films that were made more accessible to audiences, as often these were released solely on other formats, like video-on-demand.

While DVD was changing viewing habits in terms of physical media, virtual media was also changing thanks to the advent of pay-per-view. Pay-per-view and video-on-demand provided an alternative method of watching films and play a pivotal role in understanding what streaming is today. These release strategies emerged from the launch of Home Box Office (HBO) in America in 1972, which operated as a form of “pay-cable television” and differed from over-the-air television and offered various new channels, with new programming and content, including live sporting events and unedited theatrical releases (McDonald, 2007, p. 108). This was essentially the first subscription model for film and television, as customers would pay a fixed rate for new programming, with providers offering a “widely diversified portfolio” to justify the price. The notion of paying to get access to more content and more films is where the essence of streaming begins to emerge within the film industry. Paying the price of a cinema ticket to see a new film is nothing new, but home media and home viewing

provided multiple opportunities to purchase additional movies in the years that followed. Video-on-demand (VoD) extends from both pay-cable and over-the-air television, to offer customers access to content without the restraints of a typical broadcasting schedule. In the United Kingdom, early VoD was trialled by the Cambridge Cable Network and Kingston Communications in the mid-90s and was only made possible due to developments within technology, which allowed films to be encoded and streamed over broadband networks, meaning that they could be watched at any time and without a physical copy of the film. Whilst the internet was also developing in the mid-90s, it would only be a decade later, in the mid-2000s, when technology would advance enough that films could be streamed quickly and efficiently online. Following an Ofcom report in 2007 which examined "Movie Markets in the UK", a section which looked ahead noted that "connection speed meant films could [take] several hours to download", but as "broadbands speeds [were] increasing steadily", this will improve the speed of online viewing and truly offer "on-demand content" (p. 86). Nevertheless, other methods of obtaining and watching a film digitally were also introduced in the years leading up to this moment.

How audiences could access a film went even further with the notion of transactional-video-on-demand (TVoD), which was introduced in the late 90s and allowed "consumers to pay for access to a [single] film" for a limited amount of time (Ulin, 2009, p. 368). These were essentially online video rentals, much like the video rentals that existed with physical media in stores like Blockbuster but meant that customers "could view content with a single transaction and with the convenience of never leaving the home" (McDonald, 2007, p. 170). The idea of not having to leave the home is something that only truly emerged in the mid-90s with the web, following the launch of Amazon in 1994, as an online bookseller, with eBay the following year, as well as fast-food chain Pizza Hut selling pizzas online through a virtual portal (Lufkin, 2020). Although these outlets were just a select few that committed to the e-commerce strategy, they set a new stage for accessibility and knowledge, allowing customers to browse products, compare prices and receive products directly at their door. It is important to note that there was a digital divide during this time in the mid-90s, which was a gap between those who did and did not have access to a computer or the internet. It was regarded as unfair and led to "information and knowledge inequalities," particularly in rural and working-class areas (van Dijk, 2006, pp. 1-3). Therefore, the privilege of not having to leave your home was only attributed to those with access to a computer and the internet in the first place. In terms of films, although physical media could also be sent to a customer's door, as Tom O'Regan notes discs and tapes could "cross checkpoints and borders" to reach wider populations, and the introduction of portable DVD players in the late 90s meant that films could go beyond the living room, it still lacked the level of instant accessibility associated with virtual media (1991, p. 118). The web allowed movies to bypass delivery waiting times and be transported through technology, without the means of mechanical production or playback. Jeff

Ulin writes that when these strategies were combined with the internet it blurred the notion of what VoD was, as suddenly online stores, such as iTunes, which grew in popularity throughout the early 2000s, became virtual video stores where consumers could browse, purchase, and watch films (2009, p. 368-369). Moreover, the strategies implemented by online retailers given the presence of physical home media and video-on-demand are the exact intersection of where the contemporary streaming giant Netflix got its roots.

Netflix was founded in August 1997, which was less than a year after the launch of DVD. In an interview with the *Silicon Valley Business Journal*, the company's co-founder, Marc Randolph, shared the desire to create "an e-commerce site that did video rental," which at the time "was [just] VHS tapes," with which Blockbuster was succeeding (Xavier, 2014). When DVD emerged, it came as an economically viable alternative, as VHS tapes had "logistical challenges in terms of shipping" around the world, thus making them impractical. Randolph, along with co-founder Reed Hastings, heard about the emerging disc-based format, and tested their shipping durability with a "CD in a little blue envelope" and mailed it to each other. When it arrived in perfect condition, it initiated the idea that the "model might work," which eventually launched Netflix as a mail-based rental business.

In the years that followed, Netflix and Blockbuster became rival competitors of movie rentals, but each company had differing business models that would eventually determine its longevity within society. For instance, as Netflix was a mail-in service, it meant that customers could return discs without entering an actual store, whereas Blockbuster would often profit from late returns from customers who could not make it back in time, as they did in 2000 by "collecting \$800 million in late fees" (Huddleston Jr., 2020). Moreover, Netflix went one step further and ditched the late fees completely, and Tom Huddleston Jr. notes that the company's early success "hinged on luring away Blockbuster customers who were tired of being charged fees" (2020). Dawn Chmielewski notes that by 2002, Netflix grew as a company, generating \$82.5 million from stock offerings and growing subscribers who would pick DVDs from the comprehensive library (2020). On the other hand, Blockbuster's success declined in the years that followed. By 2006, Blockbuster was troubled by "arguments between the company's board" and a severe debt of roughly \$1 billion (Huddleston Jr., 2020). On top of that, the company was still competing with Netflix, which had now "just passed the 4 million customer mark" and decided to launch the online retailer blockbuster.com as direct competition but was an expensive endeavour that led to further losses (Ulin, 2009, p. 195). Moreover, Netflix's growing popularity among consumers is not only attributed to its business model but to its approach to advancing technology and how it can enhance the audience experience too.

Throughout the time of Blockbuster's demise, Netflix was expanding beyond the mail-in service by "utilising the internet to [create] a virtual VCR" with the launch of its online platform in January 2007 (Ulin, 2009, p. 195). Netflix's early online presence introduced video-on-demand to the internet and gave customers "thousands of titles from its catalogue with instant access" to view them. This was around the same time when internet and broadband speeds had developed and improved, reducing the download time for digital viewing significantly, thus making the streaming model practical for the first time in the internet's presence (Ofcom, 2007, p. 86). Furthermore, a report by the *Office for National Statistics* found that while in 1997 only 9% of UK households had internet access, this had increased to 61% in 2007 (Taylor, 2023). This moment within the film industry is the culmination of various home viewing movements that have occurred in the previous decades, from cable television to video-on-demand, from videotapes to discs, and from rentals to online platforms, the arrival of Netflix online would create another new window for audiences to watch movies. It would also use digital technology to drastically change the practices of home viewership, by taking it in new and innovative directions in the years that followed.

When Netflix first expanded to an online platform in 2007, it was initially only offered to subscribers of the company's mail-in service. For instance, as Miguel Helft notes, subscribers who were on the \$18 a month plan were "entitled to three-disc rentals and 18 hours of free watching" on the online platform throughout the month (2007). Moreover, customers who were on cheaper plans, and could only receive fewer disc rentals, would also receive "fewer free hours." Alternatively, the average price of cable in the United States was \$22.35 per month in 1995 and rose by an average of "5.8% yearly in the next 20 years", with a price of just under \$50 per month in 2007 (McAlone, 2016). Helft continues that Netflix subscribers could only watch a "limited catalogue of about 1000 movies" online, whereas the DVD rental service offered around 70,000 titles (2007). Although the online content was just a fraction and viewing times were limited, it does highlight the early state of online streaming platforms, as audiences still had a range of choices to watch instantly, without having to leave their home to browse. Furthermore, as more people were getting access to an internet connection, the arrival of streaming drastically impacted the home-media industries by introducing the online subscription business model to audiences. Subscriptions were similar to cable television viewing, but the use of the internet brought the benefits of video-on-demand, such as convenience and speed. In addition, streaming still had the same abilities that physical media did, such as pausing or forwarding films, but at the same time differed, as it was no longer a case of renting or purchasing tapes or discs on a per-title basis. Moreover, even though early Netflix subscriptions only offered 18 hours a month of viewing, this was still an economic benefit, as transactional VoD could have cost "typically \$5 [per] rental" (Helft, 2007). At the same time, if subscribers watched only part of a film, the duration would

be deducted from the 18 hours and would “only [be] charged for the duration actually watched” as opposed to the individual rental fee per title. In 2008, Netflix used the advancements in broadband speeds and technology and offered subscribers unlimited hours of viewing per monthly fee, as well as access to disc rentals, too. A few years later, in 2011, the company offered a “streaming-only subscription for \$7.99 a month” at a cheaper rate without disc rentals and attracted a total of twenty million subscribers, some of whom were signing up exclusively for digital viewings (Schonfield, 2011). Throughout this time, rival streaming companies were introduced in the United States, from Hulu in 2007 to iTunes in 2008, and the growing advancements in technology, including the launch of YouTube in 2005, further set the stage for digital viewing and allowed streaming to hold a firm place amongst the variety of methods of watching a film at home.

Streaming may have been successful in attracting new customers, as Erick Schonfield writes that Netflix’s appeal helped “drive subscriber growth up 63%” in 2010, due to factors such as increased catalogues of content and the option for free trials (2011). However, it is important to remember that studios saw cinemas as the primary mode of consumption of film, due to the preferred box office revenues. While the theatrical window and business models developed to protect these revenues will be explored in the next chapter, streaming was viewed as a secondary release method during this time. In addition, it was not the only secondary market for movie watching, with physical media, cable television on video-on-demand continuing to develop alongside technology. For instance, home video had another disc-based format with the introduction of Blu-Ray in 2006. This format superseded DVD and continued to meet the requirements imposed by the Hollywood Digital Video Disc Advisory Group but in a more advanced way. Blu-Ray discs could store more hours of video and offer “superior visual and sound quality,” with a resolution of 1920 by 1080, as well as a “raft of additional materials”, such as “commentary tracks and even additional cuts of entire films,” demonstrating its enhancement over DVD (Willis and Wroot, 2017, pp. 1-2).

During this time in the United Kingdom, Sky had also been the leading provider of subscription television and had offered films to its subscribers via satellite to their television sets since the mid-90s, and through a host of names, until the better-known Sky Movies in 2005. It operated similarly to cable television in the United States and offered a variety of programming for a fixed subscription, which was around £20 per month in the early 2000s. In 2007, the company rebranded their service by dedicating each of its ten film channels to a specific genre of movies, such as Drama, Classics and Sci-Fi/Horror. A year later, Sky rolled out “seven HD movie channels,” which gave subscribers a picture quality on par with Blu-Ray, which was aimed to “capitalise on the surge in awareness and purchasing of HD TVs” (Sweney, 2008). In 2010, Sky was involved with the novelty phase of 3D, which was explored in the previous chapter, and used the home release of *Avatar* to launch Europe’s first 3D television

channel. Although Sky was programming movies on channels at this time, it also began to incorporate two models of video-on-demand. The first, push VoD, was introduced in 2007 to HD set-top boxes, and automatically records and stores popular programming that viewers can use to catch up. In 2010, Sky launched Anytime+, which was a pull VoD model, that, rather than automatically recording content, stores it on the internet for customers to select and watch at their leisure (Chacksfield, 2010). This further demonstrates how video-on-demand, beyond Sky, had continued to develop alongside the technology and internet around it, and as a result, was able to offer higher quality rentals or digital purchases of films to customers. Moreover, the appeal of VoD can also be attributed to branding.

Michael L. Wayne writes that VoD on websites such as Amazon or iTunes benefited from the global brand recognition of their storefront, as these companies aimed to “forge a symbiotic relationship with television networks [and studios]” to help enhance and “expand [their] e-retail business” (2017, pp. 726-727). For instance, Amazon’s pre-existing customers and subscribers could see film rentals as an extension or a benefit of their membership, especially with special promotions which were offered on occasion. In 2011, Amazon rebranded their digital service to become Amazon Instant Video (later Amazon Prime), a “streaming service with access to 5000 movies and TV shows,” with the option for video-on-demand remaining for either non-subscribers or a wider variety of films, which other platforms lacked (Wayne, 2017, p. 731). The early 2010s had a range of methods to watch films, which was significant and demonstrated how companies used developing technology to get films out to audiences in the highest quality and most convenient way possible. Andy Willis and Jonathan Wroot state that with “each new exhibition outlet,” whether that be television, VHS, DVD, video-on-demand or Blu-ray, there was always a “fear that it would cannibalise audiences” and drive them “away from cinemas and the theatrical experience” (2017, p. 2). With streaming now arrived at public consciousness and established within the industry, as well as building upon previous formats of home media, the same fears of how it would cannibalise audiences arose. Furthermore, streaming introduced a new market and its arrival divided industry professionals in a similar way to the arrival of VHS, which at the time, introduced the physical media market successfully. With both mediums, some saw the benefits of the emerging format, whereas others were doubtful of its potential effect on movie-going. Although the impact of streaming on cinema-going will be explored in detail in the chapter “Cinema Vs Streaming,” it is important and useful to understand how exactly streaming exists among the other formats of home viewing.

When talking about earlier methods of home video, McDonald argues that formats like DVD, VoD and pay-per-view “compete for a small segment in the attention economy” of the public, as their time spent watching video differs from other past-times, like “radio and recorded music” (2007, p. 170). On the other hand, Willis and Wroot view the market, now updated with streaming and higher-

quality formats, as one that is less competitive, and instead “complementary to the theatrical experience”, with distribution companies opting for “releases across various platforms” to ensure more profits and revenues (2017, pp. 2-3). Although examined in greater detail in the next chapter, a major film would typically be released in cinemas, and then made available to buy or rent either digitally or physically after a 16-week window in the United Kingdom, or 90 days in America, and then eventually put on streaming services for its subscribers. Smaller films may have had the option for video-on-demand and other digital releases, but the online avenue changed drastically in 2015 when Netflix began to produce and release their own original films directly to their service with *Beasts of No Nation* (Fukunaga, USA).

Beasts of No Nation had a limited release in selected Curzon and other independent cinemas the week before its online release, which is partly due to Curzon’s approach to distribution. The British cinema chain launched Curzon Home Cinema in 2010, which enabled audiences to watch “new cinema releases at home” with day-and-date releases, allowing greater accessibility to new independent and art-house films nationwide (Driscoll, 2012). Most larger chains would not distribute a Netflix film, due to the theatrical window, but the streaming company’s decision to adhere to a cinema release for certain films not only allows audiences to optionally experience it on the big screen, therefore acting truly complementary to the theatrical experience, but as Ben Child suggests, it acts as an opportunity for the company to “use cinema screenings to boost its products profile”, and therefore its platform, too (2015). This highlights streaming’s potential as an alternative platform for film releases, as it provides a more economically viable release strategy for smaller and independent films, which might not financially succeed in a traditional cinema release, further demonstrating how each new format from physical to VoD to streaming has always increased the accessibility of titles. Streaming releases also mark a turning point for Netflix, and its attempts to distinguish its brand identity on the same global level that Amazon or iTunes had a few years prior, as Wayne writes that during this time the company began introducing “pre-roll promotion and network logos on title cards” which positioned “themselves as the audience’s primary point of identification” (2017, p. 726). Furthermore, *Beasts of No Nation* led an array of original films, noted as Netflix Original Films, which would be released by the company, including future Best Picture nominees, *Roma* (Cuarón, Mexico, 2018), *The Irishman* (Scorsese, USA, 2019) and *Mank* (Fincher, USA, 2020). Each of these films, as well as several other Originals, did have limited theatrical runs but were also directly released on the platform to its subscribers, allowing them to watch brand new films, which ranged from critical acclaim to high-profile casts, in the comfort of their homes and inclusive of their subscription fee. The benefits of streaming draw together developing digital technologies and the viewing habits of the prior four decades to give

audiences the most direct way to consume a selection of movies, which ultimately impacted the physical media formats that continued to be produced.

Willis and Wroot note that digital sales, which include streaming and digital downloads, overtook the sales of DVD and Blu-rays in the UK by the end of 2016 (2017, p. 4). A further study conducted by the British Association for Screen Entertainment shows that in 2015 consumer spend for physical media and digital subscriptions were approximately £1.08 billion and £538 million, respectively, whereas, in 2019, these figures switched drastically, with physical media accounting for £477 million and digital subscriptions accounting for £1.72 billion, which was “66% of consumer spend” (BASE, 2019). Online purchases are not only more popular in the film industry, but in the entire retail industry, as Sarah Butler states that in 2019, online shopping accounted for around a fifth of retail sales, with that figure expected to rise to 53% in the following ten years, as younger generations growing up with technology will add to the retail economy (2019). Moreover, Richard Lim, a retail economics analyst, stated that online shopping has meant that high-street “retailers have to reinvent themselves to stay relevant” against the competition (Butler, 2019). This contrasts with the film industry, as streaming is essentially a reinvention of physical home media, which uses factors, such as original content, convenience, and digital technology to stand out, whereas formats like DVD and Blu-Ray have remained almost the same. Moreover, whenever an original film was released directly to streaming, it suddenly became a part of a digital library, consisting of both old and new films, that subscribers could browse through and enabled them with the same “freedom to choose” that Gomery noted for VHS in video-stores but now with the convenience of never having to leave their home (1992, pp. 276-278). While this was a privilege for those with access to the internet in the mid-90s, by 2018, 89% of UK households had access to an internet connection, thus cementing it as a new norm (Taylor, 2023). With streaming growing extremely popular among audiences, it has allowed different studios and distribution companies to devise their own platforms and services to cater to the market and offer audiences varying digital libraries, leading to new methods of curation and marketing in order to stand out from one another.

Netflix, remaining one of the pioneering companies in the streaming industry, has reaped the benefits from the use and innovation of algorithmic recommender systems. Mattias Frey explains this in further detail in his 2021 book and states that these systems help streaming to stand out and differentiate from “linear television and cinemas [which] drip-feed content by programmers” by using “algorithmic calculations of personalised taste” to recommend films to an individual and not an entire market (2021b, p. 38). These operate by recommending films based on the subscriber’s viewing activity, analysing details from the genres, cast, crew, and reviews of their previously watched titles, and suggesting their next viewing based on similarities and other mutual aspects. In an essay published

on the official Netflix Tech Blog, Fernando Amat et al. share that recommender systems go beyond suggesting films, but instead, try to help audiences “discover great and unfamiliar content” (2017). Furthermore, they note the importance of artwork, which acts as “the gateway to the title” and how multiple images and artworks exist, featuring different actors or scenes, and are selected to “present the perfect image to the homepage”, thus appealing to the individual directly, as opposed to a single poster for every subscriber. This strikes similarities to Gomery’s noting of VHS which appealed to “the desires of the individual fan” rather than network audiences as a whole, but streaming achieves this more accurately and scientifically (1992, p. 276). Frey adds that “suggesting films has existed since mass audiences could afford to consume them,” showing that recommendations have existed through reviews, word-of-mouth, posters, and other marketing materials (2021b, pp. 38-39). But where algorithms stand out is not necessarily through their mathematical accuracy but their invisibility. Frey states that recommender systems give subscribers an “illusion of plenty,” regarding the number of available titles when secretly these systems are carefully “reducing choice” to the most suitable of movies (2021b, p. 40). Throughout the history of home media formats, choice has been an essential factor among subscribers, from choosing which television channel to watch to selecting a DVD in a video store, or which film to rent online. With streaming, these systems are presenting a digital library of an array of titles, which have already been refined based on suitability, and yet still give the illusion of choice. For instance, it is as if an avid horror fan walked into a Blockbuster to find an entire store filled with horror films, but instead, a recommender system has “sorted, categorised, filtered and suggested” content that was best suited, and at the same time, everything else continues to remain in other areas on the platform (Frey, 2021b, p. 40). Having plenty of content allows streaming companies to appeal to more subscribers, and therefore make more revenues, which in turn, has saturated the market with multiple, competing streaming services that use algorithms and recommender systems in different ways.

For instance, Amazon Prime Video features a “data-driven front page” which is filled with personal recommendations, like Netflix, but differs by embedding titles and content throughout the entirety of its e-commerce site (Frey, 2021b, p. 40). Moreover, when MUBI launched in 2007, it had a completely different model, as it operated as an “online art film library with a revolving thirty film [selection],” and at the same time, completely “non-algorithmic and non-personalised” (Frey, 2021a, p. 54). Instead, it was a “curation-style video-on-demand” service, with each title available carefully selected to create an aggregate of critically acclaimed films, foreign and art-house cinema that is distributed to its subscribers, offering a “space for cinephiles” in the market. MUBI has since expanded to offer a permanent catalogue of specially curated films, which not only holds value to a niche audience but creates a platform for even more obscure and harder to find films to become accessible

online and worldwide. Furthermore, different studios have gone on to develop their own platforms, such as Paramount+ and HBO Max, which feature Warner Bros. films, in America, as well as the globally available Disney+. Plans for these platforms pre-date the pandemic, and each one markets itself on the nostalgia of their childhood films, classic films and properties based on established franchises. For instance, Sarah Whitten writes that “Disney’s strategy is predicated on stirring up sentimentality around movies and shows” from the company’s history, thus demonstrating how different companies have utilised technology and marketing tools differently (2019). Studio-based streaming services, as well as MUBI, and their impact on viewer habits will be analysed in greater detail later on in this thesis, but these platforms often share a reliance on niche audiences and nostalgia to attract subscribers, which, coincidentally, have been the two factors that have kept physical media apparent within the streaming world.

Observing the dominance and appeal of streaming, Willis and Wroot argue that physical formats, like DVD and Blu-Ray, “no longer offer the primary alternative to theatrical consumption” (2017, p. 3). Since the days of VHS, physical media has granted audiences the freedom to choose the film that they wanted to watch, without the reliance on television or cinema programmers. Disc formats have also allowed smaller films to be more accessible to growing audiences. However, streaming arguably achieves the merits of physical media in a greater way, using emerging digital technology and a subscription model to offer even larger catalogues of films directly to personal devices already present in the user’s home. In addition, streaming libraries can be easily navigated with search functions, and websites, such as JustWatch.com, can even notify users to what specific platform a certain film is available on, which is more efficient, quicker, and convenient than browsing through the aisles of a physical store, which might not have a particular title in stock. However, streaming’s reliance on digital libraries and viewings is where the “significance of discs remain” (Willis and Wroot, 2017, p. 3). Willis and Wroot continue that collectors, cinephiles and fans have found a purpose for physical media on their shelves, such as “youngsters who repeatedly watch Disney films,” who can enjoy bonus content on special editions. Moreover, they continue to note that “older cinephiles” who avidly watch “contextualising interviews on collector’s editions” or even appreciate special packaging on the product itself, are gaining from “what is offered beyond the film.” Bonus content is not always made available on streaming, and is often hidden in additional navigation menus, whereas it was a requirement and aim set out by the Hollywood Digital Video Disc Advisory Group in the early days of DVD. This continued with labels such as the Criterion Collection, which releases “lavishly packaged, bonus feature-laden editions of classic and contemporary cinema” at a greater price than standard DVDs and Blu-rays (Clark, 2016). The Criterion Collection even began to release special editions of Netflix Originals, and their success and popularity amongst fans and consumers

demonstrate the role that physical formats can continue to have within the home viewing markets. At the end of the day, physical releases, alongside streaming and theatrical releases are all bringing in revenues for studios and distributors which further highlights that these are release strategies that work complementary with one another, rather than competitively.

In conclusion, the role that streaming has within society and the film industry is a result of the previous formats and moments from within the history of home viewings, as well as the advancements of digital technology that have made it as possible as it is today. From VHS to DVD and Blu-Ray, programmed television to cable television and video-on-demand to streaming, there has always been the “fear that each new exhibition outlet would cannibalise audiences” from the theatrical experience (Willis and Wroot, 2017, p. 2). However, with so many methods of watching a film, it has always created new windows for studios and distribution companies to earn more revenues and arguably act complementary to a theatrical release. Streaming, in particular, has benefited from the developments within technology, by not just creating new release strategies or easing the accessibility of harder to find films, but in the convenience that it offers its subscribers, especially in a society geared towards a greater online e-commerce market. With several streaming services on the market, these all offer different subscription rates with a different, variety of content. These platforms have always prioritised accessibility and convenience, whilst maintaining the ability and freedom to choose that physical media enabled. The use of algorithms and recommender systems are revolutionary in marketing and truly allow streaming to stand out among and build upon the other home video formats beforehand, by uniquely appealing to the subscriber on an individual level. Furthermore, the study conducted by BASE highlights the growing popularity of streaming, which reached “66% of consumer spend” in the home media markets in the United Kingdom in 2019 and is a figure which is likely to continue to grow in the years that follow (2019).

Home media and physical formats provided alternative methods of consumption that would challenge the developments occurring in cinema at the same time. This would lead to the development of the theatrical window as a business model, which the next chapter will explore, but it is the advent of streaming, and its overall popularity and dominance, that when combined with its use of science and technology, has allowed it to become the primary alternative to theatrical consumption. This had significantly changed the situation in the film industry by the time of Covid’s arrival in 2020, as studios had a significant new release strategy, which Willis and Wroot argue was “increasingly complementary rather than competition” to a title’s theatrical appearance (2017, p. 3). However, with the production of original films and content growing in quantity, streaming’s role within the industry was one that could pose a threat to the consumption of film in the future, especially when Coronavirus would bring the closure of cinemas. Out of all the additional markets introduced in cinema’s history, streaming is

the one that has the power and momentum to rival the cinema-going experience, and ultimately challenge the theatrical business models, release practices, and power balances that exist in place.

Chapter 4:

The Impact of the Theatrical Window

If digital precipitated the provision of new technical forms in the cinema and revolutionised the home media markets with the advent of streaming and online viewing, then the knock-on effect of this was a change to the strategies of theatrical release. With multiple methods of movie watching available, tools like the theatrical window have been introduced to ensure lucrative revenues for all parties, and by tracking the window as a release model until the moment of Covid's arrival, provides an understanding of the situation the industry was in when the virus closed movie theatres, and therefore, removed the cinema as a market to watch movies.

The theatrical window is the length of time between a film's release in cinemas and then being made available on other platforms or markets, such as streaming or home media formats, like DVD and Blu-Ray. The window has changed drastically throughout the years and although there is no fixed duration required for the window, for most of the 21st century it has typically lasted a duration of around 16 weeks in the United Kingdom, which was reduced from 27 weeks between May 1999 and April 2006, due to the growing popularity of home media as an alternative revenue for studios (Bakhshi, 2007, p. 1). Furthermore, the window plays a pivotal role in the exhibition and distribution industries, and the length of time is carefully considered to improve a film's longevity, as well as ensure lucrative revenues for all markets. In order to decide the optimum length for the window, Hasan Bakhshi describes a trade-off between two opposing factors, which he calls cannibalisation and marketing effects. These factors are considered differently for blockbusters and smaller films, and the attitudes towards the window have changed throughout the years, from the rollout of roadshows to promote films from the 1920s to 1960s, to the introduction of home media with VHS in the early 1980s, and now to a more contemporary and competitive industry that also deals with social media and streaming services. This chapter explores the impact of the theatrical window with a focus on key transitional moments from cinema's history, and will also investigate the role it played in the three highest-grossing films of all time, which were released in almost decade intervals: *Titanic* (1997, Cameron, USA), *Avatar* (2009, Cameron, USA) and *Avengers: Endgame* (2019, The Russo Brothers, USA). In addition, this will establish the relationship between studios and theatre owners in the industry before Covid eventually saw the closure of cinemas, as well as track the rapidly changing distribution and exhibition industries in the prior two decades.

Before examining the role of the theatrical window in cinema's history, it is important to first establish the two key factors which Bakhshi outlined, cannibalisation and marketing effects. Out of all

the available methods of watching films, cinema admissions and ticket sales are seen as the preferred revenue by distributors, as it ultimately brings them greater profits. Cannibalisation is an economics term used to describe the loss in sales when a brand brings out a new product, similar to an existing one, such as Pepsi Max Cherry to regular Pepsi Max, which causes the brand to essentially compete with itself and share the market, rather than other competitors. In terms of the theatrical window, if a film was released in cinemas and physical media at the same time, the studio would essentially be competing with itself, and DVD sales might cannibalise ticket sales. Therefore, when Bakhshi mentions cannibalisation effects, there is an emphasis on a longer theatrical window, which in turn “protects box office revenues” as, throughout this period, ticket sales are the exclusive source of revenue, and studios are not competing with themselves (2007, p. 5). A longer window has traditionally been the norm, as a film generates revenues from a cinema release before being made available on other platforms at a later date, with the chance to generate additional revenues.

On the other hand, marketing prefers the complete opposite, as a shorter window brings greater benefits. This is because when a film is released in cinemas and is made available on other platforms, like home video, shortly afterwards, it can “boost DVD and video sales” due to pre-existing promotional material (Bakhshi, 2007, p. 5). Moreover, having a shorter window also benefits particularly smaller films, as it encourages word-of-mouth to build and “helps to raise the awareness of the film” by sharing marketing across different channels (Willis and Wroot, 2017, p. 149). In 2015, Paramount released *Scout's Guide to the Zombie Apocalypse* (Landon, USA) on October 30th in cinemas in America, as a timely Halloween release, but decided to release the film digitally just five weeks later on December 8th, after underperforming at the box office and wishing to generate additional revenues in the run-up to Christmas, while marketing and promotional material remain relatively fresh. Moreover, both of these factors play a pivotal role in deciding the best duration of the window for a film, and it is therefore important for distributors to examine if a film should have a longer period of theatrical exclusivity or share marketing across multiple channels.

Although 16 weeks has been the average for mainstream releases in the 21st century, this has never been a requirement, but rather a preference by certain cinema exhibitors. In the United Kingdom, cinema chain Cineworld, which has owned the arthouse chain Picturehouse since 2012, has a strong policy on the theatrical window, and only agrees to exhibit films that respect it, stating that if a film was made to be shown in cinemas, it should respect the window that protects the experience (Grater, 2019). However, new release strategies have been introduced, such as VoD, which has offered day-and-date releases for independent films since the mid-2000s, and streaming, as Netflix began releasing original films since 2015. These have made the discourse and discussions surrounding the window duration even more complex in the contemporary industry. Ultimately, the window's length is

an economically motivated decision, which prioritises the potential revenues and box office returns for a film, and this has been apparent throughout the rapidly changing history of film releases.

Data surrounding cinema release strategies following the First World War is more prevalent when focussing on that of the United States. Therefore, whilst contemporary research will focus on the United Kingdom, the history leading up to it will examine America, which had two main forms of release strategies in theatres. The first was the States Rights system, which meant that the “rights to show or tour films were franchised to distributors or exhibitors in specific states” only, which offered an effective marketing system as films were shown to inherently selected states that could generate greater potential revenue (Neale and Hall, 2010, p. 3). It also meant that film prints, which would wear and scratch from continued use, would benefit from certain states, as they could be shown to as many people as possible. In 1914, the States Rights system was superseded by the Hodkinson system. This system was founded by W.W. Hodkinson who merged eleven film rental bureaus to form Paramount Pictures, who were also the first US-wide distributor of feature films. The Hodkinson system was more efficient and economical, allowing distributors to finance film productions and releases, and paved the way for block-booking to be introduced in the 1930s, which meant exhibitors were required to purchase a bundled package of titles if they wanted to exhibit a certain movie (Schatz, 1988, p. 39).

The other release strategy was roadshows, which opened a film in large and prestigious theatres in select major cities before having a wider release in additional and non-specialised movie theatres across the nation, which Steve Neale and Sheldon Hall note could take “weeks, months or sometimes years” to occur (2010, p. 3). Kim Holston notes important criteria for a release to be determined as a roadshow, which are: exclusivity in one urban area, showing at least twice a day and tickets must cost more than a regular feature (2013, pp. 4-5). These criteria demonstrate the desire for lucrative revenues, and larger films might be favoured in this release format rather than traditional releases, as the higher ticket prices lead to greater box office success. The early roadshow format had proven popular with films like *The Birth of a Nation* (1915, Griffith, USA), which also took place in larger pre-release cinemas, and was often accompanied by a live orchestral score (Neale and Hall, 2010, pp. 3-4). But as Neale and Hall continue, the basis of roadshow films meant that the movies exhibited in this way had to be “chosen carefully for the prestige value and their audience appeal” in order to justify the special status of a roadshow release. *The Birth of a Nation* was much longer than other films and offered a patriotic spectacle for white-American audiences, which would set the precedent for roadshows in the following years as spectacles, that “connoted prestige and importance” that could therefore justify the specific mode of presentation (Neale and Hall, 2010, p. 4). Other notable examples include *The Jazz Singer* (1927, Crosland, USA), *Gone with the Wind* (1939, Mitchell, USA) and *Fantasia* (1940, Armstrong et al, USA).

As discussed previously, TV ownership became common in the 1960s in the UK, but in the US, this happened a decade earlier in the 1950s, which also marked the first time that films had been made available in a market outside of the cinema (Belton, 1992, pp. 12-14). As a result, audiences were staying at home to watch movies, rather than visit a cinema, which did prove to “have been a source of revenue for the major producers of feature films” (Neale and Hall, 2010, p. 235). But with cinema revenues still being the preference, and televisions only showing a back catalogue of titles, it created the opportunity for studios to revive the roadshow, in an attempt to not only entice audiences back to the spectacle of movie theatres but promote new and upcoming widescreen epics.

In the 1950s, the cinema release model and the role of the theatrical window were still very different to the 16-week window that existed throughout the 21st century. With cinema and TV networks being the only markets for film revenues, albeit to different extents, the release model for films tended to favour the cannibalisation factors, which meant cinema ticket sales could be boosted and promoted throughout a longer period of theatre exclusivity, as this market provided much more lucrative revenues, as well as offered newer films. This is where it directly ties into the revival of the roadshow in 1952, which always fixated on greater revenues with prestigious release requirements. As Holston notes, the roadshows of the 1950s were often filmed in Cinerama and other widescreen formats and were not necessarily defined by a genre, as the films “crossed genre lines from historical to drama to musicals and science-fiction” (2013, p. 5). After examining widescreen cinema in Chapter 2, it is evident that this format sought to offer a unique and immersive experience that had the potential to “lure audiences back into the theatre,” just as the advent of sound did (Belton, 1992, pp. 12-14). This is why the combination of widescreen and roadshow aims to cement the release as something special and prestigious and can be certainly distinguished from a regular theatrical performance.

Neale and Hall state that one of the most pivotal films in understanding the impact of the roadshow release model was the success of *The Ten Commandments* (1956, DeMille, USA) (2010, p. 159). At the time of its roadshow release in 1956, *The Ten Commandments* was “the most expensive film ever produced,” and featured some of the largest sets that were ever created for a film, therefore justifying the specialness typically associated with roadshows (Sharf, 2015). The film was first shown in New York City, before expanding to fifteen other US cities by the end of 1956, and then to an additional 36 locations in early 1957 (Neale and Hall, 2010, pp. 159-160). The roadshow release of *The Ten Commandments* eventually lasted two years, before being released to ordinary theatres in 1958. During its first year of roadshows, it played nearly 1000 engagements in the United States, which Neale and Hall note was done with the desire to “keep the picture in circulation for as long as possible [to] maximise box-office potential” (2010, p. 160). This further demonstrates how the preference for

roadshows over traditional releases favours the cannibalisation factors and the desire to make as much revenue as possible, and therefore not competing with itself across multiple markets. But as television sets were also becoming more common in homes, it was still not regarded as a lucrative revenue at the time, and *The Ten Commandments* was only shown on television, via the network ABC in the United States, for the first time in 1973, where it continues to be shown annually on the network around the Easter holiday (Warren, 2021). Neale and Hall note that the success of *The Ten Commandments* paved the way for roadshows to be considered by studios as a viable release strategy, as it was able to “continue the technique to smaller communities,” by bringing and continuing the specialness of roadshows outside of major cities in the country. Roadshows continued to be a proven method with the films that followed, like *Ben-Hur* (1959, Wyler, USA) and *Spartacus* (1960, Kubrick, USA), but again these were films that emphasised the scale and prestigiousness that was associated with roadshows, as they were shot with large sets and with Technirama formats (Sharf, 2015). Much like CinemaScope explored in Chapter 2, Technirama created a widescreen image in 2.35:1 aspect ratio through the use of anamorphic lenses on the camera and projector to compress the image horizontally. Throughout this time was also Cinerama, which was an ultra-widescreen process that used interlocked cameras to create an image in the aspect ratio of 2.65:1. Technirama was used more frequently and favoured in the 1950s and 1960s due to Cinerama having higher costs. However, as studios saw the potential for revenues in roadshows, they began to release films that “had not been produced with the purpose [of roadshows] in mind”, such as *The Big Fisherman* (1959, Borzage, USA) and *Porgy and Bess* (1959, Preminger, USA), which were eventually “rejected by exhibitors and the public” and as a result, had their general releases brought much forward (Neale and Hall, 2010, p. 161).

Roadshows ultimately demonstrate a release model that generates greater revenues and shows a desire to maintain a period of exclusivity to achieve it. However, this did not always work out, and in these situations, general releases were pushed forward, with the same desire to generate as much revenue as possible. In the decades that followed, roadshows continued with the connotations of prestige and were used for releases like *2001: A Space Odyssey* (1968, Kubrick, USA), which played for 103 consecutive weeks in Los Angeles (Sharf, 2015). Before the arrival of VHS in the late 1970s, cinemas were the only way for audiences to watch a film outside of television sales and the best way for studios to earn lucrative revenues. However, roadshow releases slowed down in the 1970s, with the rise of multiplex cinemas developing throughout the 1960s and early 1970s in the United States (Hanson, 2019, p. 11).

Throughout the 1950s to 1970s cinemas were expanding into suburbs and shopping centres, suggesting that cinemas were “looking less like theatres and more like homes” (Hanson, 2019, p. 21). Multiplexes also had more screens, which meant they could show more films, and although Charles R.

Acland notes early concerns of “cramped auditoriums and sound leaking from neighbouring screens” from cinemagoers, early speculations about the multiplex from industry professionals were geared towards “easier windows for unusual and non-mainstream movies” (2003, p. 103). Again, this data continues to focus on developments within America, as Hollywood studios were focused on generating profits from ticket sales amid the rise of the home market. One of the prestigious factors of roadshows was the sound quality of the films, but with multiplexes being built with stereophonic sound, it was another development that diminished the appeal of roadshows. Furthermore, even when *The Ten Commandments* was re-released in cinemas, firstly in 1966, and then in 1972, these releases were in ordinary cinemas and multiplexes and would have been the only way to have seen it since its initial release, as it only appeared on TV for the first time in 1973. Multiplexes allowed a variety of films to be more accessible, especially with the emerging use of limited release strategies, which release films in a few theatres across the country to gauge the appeal and interest levels, before receiving a wider release. This allows word of mouth and buzz to be generated on a greater national level, and at the same time, marketing materials could be shared nationwide, as the period of exclusivity was considerably less than roadshows. For later popular releases like *Star Wars* (1977, Lucas, USA), this was released in a limited run in thirty-two theatres, before being expanded to a wider run after its commercial success. *Star Wars* also saw several re-releases in cinemas in the following years and only made its television debut in 1982. Throughout this time, and even beyond roadshows, cinemas have always been the only revenue stream for films, with television sales being afterthoughts at a later stage, but this would all change in the 1980s with the popularity of VHS, which provided a new market and a new source of revenue for films.

Neale and Hall note that although “TV networks have been a source of revenue since the late 1950s”, the ratings decreased in the late 1970s and TV was “no longer the event it once had been” (2010, p. 235). Coinciding with this time, was the emergence of home video formats, such as the Betamax and the VHS, which transformed movie-watching and granted audiences with the freedom to choose, without being “dependent on theatre owners or television station programmers” (Gomery, 1992, pp. 276-278). Between January 1979 and March 1980, the major studios placed 477 titles into video release, which was an 854% increase (Prince, 2000, p. 102). While video was providing an additional revenue stream, by 1985 it would prove to be significant, as the rentals and sales of videocassettes would “exceed those of theatrical releases” (Neale and Hall, 2010, p. 235). This demonstrates that not only did the home media market have the potential to achieve revenues that, for the first time, could compete with cinemas, but shows a time when the industry would take home media more seriously. This had a direct impact on the theatrical window, as studios would change the duration of the window to generate as much revenue as possible, as seen by the release of the film 9

to 5 (1980, Higgins, USA). *9 to 5* was “released on video less than two months after its initial theatrical run” during the 1980 holiday season, highlighting the potential that studios saw in this new and emerging market (Neale and Hall, 2010, p. 237). The 1980s was really when the theatrical release window system became a business model that sought to strategize on different markets to generate as much revenue as possible.

Although the window in the 1980s and early 1990s was considerably different and longer than it was before Covid’s arrival, it does start to highlight Bakhshi’s idea of the opposing marketing and cannibalisation factors as something more apparent within release strategies in the film industry. While *9 to 5* was made available on video just two months after its theatrical release, this was not the case for the majority of films. As Simon Brew writes, for a film like *Terminator 2: Judgement Day* (1991, Cameron, USA), the movie was released in cinemas in the United Kingdom on August 16th, 1991, became available to rent in February 1992 and was only available to buy on video in the autumn of 1992 (2019). In America, *Terminator 2: Judgemet Day* released in cinemas on July 3rd, 1991, available to rent in December 1991 and available to buy in August 1992. Both the US and UK releases of *Terminator 2* follow a similar pattern and timeline between theatrical and home media releases, despite the film being released 5 weeks earlier in America. However, it does further emphasise how short the release window was for *9 to 5*. This also demonstrates that during the period when video emerged as a new market, the rentals and sales of videos were seen as two different revenues, with their own windows. Neale and Hall note that the income generated from home video was “evenly split between rentals and sales” showing how both options were popular choices among customers (2010, p. 238). But it was also favourable for studios and video stores, too, as the rental period provided one revenue and six months later, customers who still desired to see the film, now had the option to purchase the videotape of it. This is evident with the success of *E.T. The Extra-Terrestrial* (1982, Spielberg, USA) which generated \$187 million from video rentals, and an additional \$175 million from sales (Neale and Hall, 2010, p. 238). Another benefit of having these additional windows is that it helps to ensure that cinemas were making a profit too, and with *E.T.* it grossed \$619 million worldwide. Cinema owners have always been vocal about exclusivity windows to ensure that lucrative revenues can be made for them, and therefore help to keep their businesses running. Even with the release of *9 to 5*, there were initially some complaints about the reduced window, and in addition, as Brew notes, it became regular for some studios to “skip the rental stage” and capitalise directly on video sales, as although both earned revenues, the studios themselves were taking a greater cut from the sales of videotapes (2019).

All of these factors, from the separate windows for rentals and sales to the length of time and potential revenues, help to demonstrate the role that the window plays. Studios have to take all of this

into consideration, whilst showing respect to cinema and video store owners and finding the perfect balance that can generate profits across each market. This links back to Bakhshi's cannibalisation and marketing factors, as too long a window could impact the sales and rentals of videotapes, whereas too short could impact ticket sales. Furthermore, as technology developed, the introduction of DVD in 1996 would provide another new market for home media. Approaching the new millennium, it not only marks a stage of technical innovation but marks a turning point in this research. Whilst this chapter has been focussing primarily on data from the United States, there is more information available surrounding 21st-century data in the United Kingdom. As more contemporary research in the later chapters of this section, as well as the next section of this thesis, will focus on examining the United Kingdom distribution and exhibition industries, this moment in time can be used to now focus on the theatrical window in the UK, which would continue to be impacted by the developing home media industries.

In 1999, 3 years after the launch of DVD, the theatrical window in the United Kingdom lasted for a period of just over 6 months, at 190 days (Bakhshi, 2007, p. 1). By 2002, Paul McDonald notes that DVD was able to penetrate 50% of television households in Western markets (2007, p. 59). But it is also the same year that DVD sales had overtaken the sales of videotapes, which had a direct impact on the theatrical window (Neale and Hall, 2010, p. 257). In 2003, distributors changed their release strategies and abolished the DVD and video rental to sale window completely, meaning that customers could now buy films at the same time they were first made available to rent. Neale and Hall note that "the income earned by DVD sales became significant" around this time, further highlighting the importance of DVD as a new market (2010, p. 257). Neale and Hall specifically note the release of *Spider-Man* (2002, Raimi, USA), which had a production and promotional budget of \$289 million, grossed \$821 million from the cinema box office, and then \$89 million from video sales and over \$338 million from DVD sales, which further highlights the potential of DVD. Although VHS already showed the financial benefits of the home media markets in the late 1980s and 1990s, and other markets, such as satellite television, cable and television networks were also additional auxiliary markets where films could earn revenue, DVD would further solidify home media as a viable market in the 21st century. Studios have always aimed to generate as much revenue as possible, and it is evident from the home media sales of a film like *Spider-Man*, that cinema ticket sales and now the DVD industry were the two primary markets for revenue in the early 2000s, with the theatrical window remaining in the middle of the two.

In 2006, the average length of the window would reduce even further to just 16 weeks in the United Kingdom. This meant that studios could benefit from marketing effects and generate as much revenue as possible from each release method. Furthermore, having a shorter window meant that

studios could spread a film's momentum throughout its theatrical run and share promotional campaigns across multiple markets, rather than having separate promotional campaigns at different forms of release. However, Bakhshi also notes that the reduction was not solely due to the popularity of DVD but to growing concerns over piracy. Developing technology, as well as advancing internet and broadband speeds, "undoubtedly increases the potential for DVD piracy," and a shorter window means that all appropriate parties can secure as much revenue as possible, without losing to illegal pirate copies as an unwarranted market (2007, p. 7). However, digital technology and the internet also brought new factors that would impact the window even greater.

In an interview with *WIRED* magazine in 2005, filmmaker Steven Soderbergh was promoting his upcoming film, *Bubble* (2005, USA), which was set to have a simultaneous day-and-date release in movie theatres and television networks, with a DVD release coming a few days later (Jardin). Soderbergh stated that he chose this strategy after piracy meant that DVD copies of new releases were available at the same time as a film's cinema release, and choosing a simultaneous release was a way to gain control over the situation. As discussed in the previous chapter, in 2005, the internet and broadband were capable of hosting video playback online, and as it continued to evolve, it highlighted the potential for DVD copies of films now being available as torrents online. This meant that new movies could be watched at home at the same time as their theatrical release, albeit illegally. Soderbergh added that with independent films, like *Bubble*, it does not always have the "cultural event to turn a profit" with an exclusive theatrical release window, and he predicted that as the years progress, simultaneous releases for independent films and even bigger movies could be a more popular release strategy (Jardin, 2005). A simultaneous release is a strategy that favours the marketing effects of Bakhshi's two factors, as it benefits from one promotional budget across multiple markets and does not have any exclusivity for the more traditionally preferred theatrical release (2007, p. 1). It also means that if someone sees a poster or trailer for a film and wishes to see it, they can choose which method they prefer, such as cinema, television, or home media, and if someone preferred buying DVDs to visiting the cinema, the option is also there to do so. It follows on from the other release strategies, observed in Chapter 3, that also use emerging technology, like VoD and online releases, to provide alternative strategies for smaller films that might not benefit from a long period of cinema exclusivity.

Furthermore, the cinema chain Curzon, which programmes "carefully selected independent and arthouse films" among more mainstream titles, pioneered a simultaneous release strategy for smaller films in 2010 with its online platform, Curzon Home Cinema, to help increase accessibility across the country and boost revenues for these titles (Chacksfield, 2010b). In addition, as streaming services grew more popular in the 2010s with platforms like Netflix and Amazon Prime, it led to original

movies, sometimes with critical acclaim or high-profile actors with large budgets, being released directly onto the platform. These films, such as Netflix's *The Irishman* would either bypass the theatrical release completely or be shown in certain cinema chains, of which Curzon is often one, for a limited period of exclusivity before hitting the platform. Again, these strategies tend to favour the marketing effects, as it also can share a promotional campaign, as posters and trailers for *The Irishman* featured two release dates, "in select theatres November 1st, on Netflix November 27th", but at the same time, a smaller release window helps to generate buzz. For instance, *The Irishman* would have already been shown at film festivals prior and then had a limited theatrical release to the public, where it built word-of-mouth that could benefit its streaming release a few weeks later. However, these limited release windows have tended to not be favoured by major cinema chains, and as a result, Netflix originals, or even independent Curzon films, were not typically shown in a Cineworld or a Vue, who "operate a strict 16-week theatrical release policy" as it grants them an exclusivity period to generate enough revenues for themselves (Grater, 2019). It is important to note, that as Bakhshi stated, the window was never a specified length of time, but rather an industry average (2007, p. 1). It is often a ubiquitous decision made by studios and theatre owners, and whilst the UK has been the focus of this research for the 21st century, where the window has typically been 16 weeks, around the same time, American theatre owners were satisfied with a decided window set at just 12 weeks, or 90 days (Grater, 2019). With the window being just a standard in both countries and not legislation, it has meant that different cinema chains have taken different approaches to it. As Tom Grater notes, in the UK, Everyman cinemas operate on a "film-to-film basis," and independent chains are more permeable, with larger chains being the ones to implement strict policies. It was even been reported that when Vue did not release *A Star is Born* (2018, Cooper, USA) on its original release date due to "discussions with the studio", it was over the release of another film from the studio which did not adhere to the theatrical release window, but *A Star is Born* was released in the chain the following week after audience complaints (Aubrey, 2018). Furthermore, with the window in America set at 12 weeks, there have been calls in the United Kingdom for a further reduction to match this length, as Dave Woodward, the head of theatrical sales at Thunderbird Releasing, stated that it is difficult for some titles to "sustain momentum across the entire 16-week period" (Grater, 2019).

With so many factors now impacting a film's release, as well as the growing number of movies being released each year, the window has not been reduced since 2006. Between 2006 and the arrival of the pandemic in 2020, there has been 14 years of changes and developments in the industry. From the advent and popularity of streaming, new technical viewing formats in theatrical exhibition, and shifting audience behaviours, which will be discussed in greater detail in Chapter 5. But what role exactly did the window have in the industry before Covid's arrival in 2020?

The theatrical release window has always been a tool used to determine how a film can generate the best revenue possible and has been viewed differently across different titles, platforms, and releases. If the window should be reduced, to either the 12-week window that America operates or even further, or perhaps even introducing different windows for different types of films, it is a decision that needs to consider a variety of factors, businesses, and markets. An important way to view the almost constant 16-week window in an industry that has evolved rapidly in two decades is by examining the role that the window has played in the releases of the three highest-grossing films of all time: *Titanic*, *Avatar*, and *Avengers: Endgame*. Each film was released around a decade after one another and broke the records set by the previous title, and 2019's *Avengers: Endgame* allows an understanding of the industry one year before Covid emerged. The below table highlights some key information, such as its release date, box office returns and length of release window, all relating to the United Kingdom.

Film	<i>Titanic</i>	<i>Avatar</i>	<i>Avengers: Endgame</i>
UK Cinema Release Date	23 rd January 1998	17 th December 2009	25 th April 2019
UK Opening Weekend	£4.8 million	£8.5 million	£43.4 million
No. of UK Cinemas in Opening Weekend	Data not available	503	679
Weeks at #1 in the UK	1-13	1, 3-8	1-2
UK Box Office Total (adjusted for inflation)	£82.7 million (£111.2 million)	£96.7 million (£104.5 million)	£88.7 million
Global Box Office Total	\$2.19 billion	\$2.85 billion	\$2.80 billion
Home Video Release	1 st September 1998	26 th April 2010	2 nd September 2019
Length of Window	222 days	131 days	131 days

(BFI, 2016), (BFI, 2020)

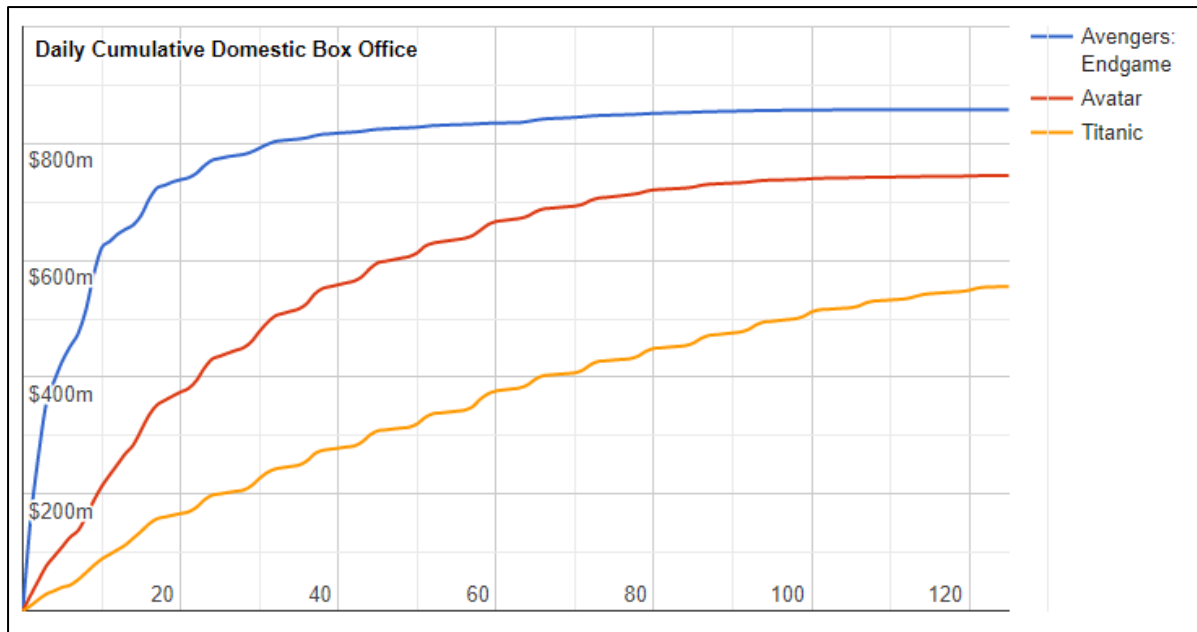
Firstly, it is important to note that the earnings for opening weekends for each film has not been adjusted for inflation, but the figures for total UK box office shows include both the original gross and the total adjusted for inflation. This data is useful in many ways and highlights interesting developments that have occurred over the years. Firstly, the length of the theatrical window has reduced by almost 90 days between *Titanic* and *Avatar*'s releases but has remained the same for *Avengers: Endgame*'s release. The reduction between 1998 and 2009, as explored previously, is due to emerging technologies, such as DVD, which provided a new lucrative revenue, as well as piracy. *Titanic*'s initial home release in September 1998 was on VHS and only received a DVD release almost a year later in August 1999. Between 2009 and 2019, there have also been new technologies that have emerged, such as streaming, but also new release strategies growing more popular, such as

simultaneous releases. This table does not include the release dates for each film on streaming services, as the data was not available, but would have demonstrated another release window over time.

Furthermore, although examined further in Chapter 5, the directors of *Avengers: Endgame*, The Russo Brothers, stated that “350 more movies were released in cinemas [in 2019] than in 2009”, demonstrating a more competitive market that exists in recent years (Buchanon, 2019). It is also worth noting that *Avengers: Endgame* was released in April, at the start of the summer blockbuster season, which is a saturated calendar space for studios to release their tentpole titles. By comparison, both *Avatar* and *Titanic* had winter releases, which avoids the summer blockbusters. In addition, Jeff Ulin notes that an increase in the number of films meant that “the spacing between major movies shrank,” which is interesting when compared to the number of consecutive weeks each film had at number 1 at the UK Box Office (2009, p. 137). For instance, *Titanic* held the top spot for thirteen consecutive weeks, and although *Avatar*'s second week was lost to *Alvin and the Chipmunks: The Squeakquel* (2009, Thomas, USA), it did regain the top for the following 6 weeks, with weekend returns surpassing the previous weekend at times. Both of these successes can be attributed to word-of-mouth and buzz that would generate amongst audiences and almost persuade others to want to see the film in theatres, to not miss out on the film or experience. As explored in Chapter 2, *Avatar* used emerging technologies, such as 3D, to help generate word-of-mouth further, as audiences could share their opinions on both the film and the spectacle of the format.

However, a decade later, *Avengers: Endgame* was only able to secure the top spot for two consecutive weeks, before losing the spot to *Pokémon: Detective Pikachu* (2019, Letterman, USA), which is the first live-action adaptation of another franchise with a global fan-base. Although *Avengers: Endgame* had a considerably larger opening weekend and beat the all-time UK record, its inability to sustain the top spot demonstrates the impact of the evolving industry in more recent years (Scott, 2019).

The graph below, taken from box-office statistical data from the website *The Numbers* (2020), shows the daily cumulative totals of the three key films. Although the data only shows the films' original releases at the US box office, similar trends can be seen from the worldwide totals of each movie.



(The Numbers, 2020)

This graph shows that although *Avengers: Endgame* was able to break box-office records and generate greater revenue in a shorter period, it also started to level off far sooner than the other two films. With *Avatar*, and even more so with *Titanic*, it takes a considerably longer time to reach this period of levelling off, which can be attributed to factors like word-of-mouth, less competitive releases, and the buzz surrounding emerging technologies. A 16-week theatrical window has become a policy by certain chains in the UK, to offer a period of exclusivity, but if *Avengers: Endgame* is levelling off far before its 16th week, is this period too long, given the rapidly evolving nature of the contemporary industry? If the window was 12 weeks, like it is in America, then it could potentially add to the returns of home media sales, without taking a considerable loss from cinema ticket sales, as it is also levelling off before this period. Taking additional data from BFI's weekly box office reports, in the United Kingdom, *Avengers: Endgame* opened in 679 cinemas, with the total number of screens unknown, but in its 8th week, around the period of levelling off, the film settled the weekly box office at number 11, and in just 210 cinemas. After its 16th week, it settled at the 40th position, after being shown in just eleven cinemas in the country. In the latter 8 weeks, the film only earned an additional £1 million in its UK box office earnings. This suggests that the movie has not been able to sustain momentum throughout the period of theatrical exclusivity, and although it can be suggested that the nature of spoilers that exist online, which will be discussed further in the following chapter, makes audiences want to seek out these films sooner, it does suggest that there are benefits to a shorter theatrical window. Only being able to generate an additional £1 million throughout this time is also damaging to the idea of the window, as cinemas are not making excessive profits, and studios could arguably generate more from additional markets at this time. By contrast, in *Avatar's* 8th week, it was still at the

top of the box office, and it settled its 16th week in the 14th position in 48 cinemas, which justifies the 16-week length, and also reiterates the evolving nature of the distribution industries between 2009 and 2019.

In 2019, *Avengers: Endgame* was able to become the highest-grossing film of all time before a re-release of *Avatar* in 2021 reclaimed the title (Jain, 2021). But if a film of this scale, that even culminated over a decade of films from the *Marvel Cinematic Universe*, could not sustain a 16-week theatrical window, how can a smaller or an independent film survive it? Filmmaker J.J. Abrams even questioned whether or not “smaller films... could exist in the cinema” as exhibitors and studios cater to large-scale blockbusters with pre-established fan bases, which are bringing in audiences and money (Buchanan, 2019b). However, directly focussing on a smaller film can help to contrast, investigate, and understand how it withstands the contemporary window.

For instance, the British drama *Wild Rose* (2018, Harper, UK), was released three weeks before *Avengers: Endgame* and opened 6th at the box office with just over £1 million from 469 cinemas. The film’s gross dropped 65% and a further 27% in the two following weeks and ended its third week being shown in 305 cinemas in the country. Once *Avengers: Endgame* was released, *Wild Rose* was no longer being shown in any cinemas, as smaller films often give up screens for multiple showings of this latest blockbuster, which means that the title would next be available to watch in an additional 13 weeks, once it was released on other markets. The theatrical window has been a decision based on the trade-off between cannibalisation and marketing factors that have sought to secure lucrative revenues for all respective parties and markets, but sometimes it can prevent it. If blockbusters are the films that are generating more money for studios and theatre owners, then a longer window of 16 weeks, or even 12, favours the cannibalisation effects. If smaller films are unable to sustain the exclusivity period and competitive market, then a smaller window would be beneficial and therefore favour marketing effects. A shorter window, of even 4 weeks, could share promotional campaigns across multiple release markets, as seen by the strategies implemented for original streaming titles. In this shorter period, word-of-mouth can be generated through a limited theatrical exclusivity that can then boost viewership on other release platforms, which could have been extremely beneficial for a film like *Wild Rose*. Furthermore, other strategies like day-and-date releases can also benefit new titles in a crowded market, and at the same time, appeal to both cannibalisation and marketing effects, by having the option for the preferred revenue of ticket sales but combined with shared marketing. The theatrical window has always been a vital tool in a film’s release, but unless cinema chains can relax their policies on the exclusivity window or introduce new ones on a film-to-film basis, then that very tool could be damaging its own potential revenues.

In conclusion, the theatrical window has been an important tool in a film's release throughout the history of cinema, from the rollout of roadshows to more contemporary and innovative strategies like simultaneous releases. Distributors are constantly trying to secure lucrative revenues across multiple markets, such as cinema, television, home media, and streaming, and with more markets introduced in recent years, it does give room for the theatrical window and its duration to be reconsidered. The window is a trade-off between cannibalisation and marketing factors, which both try to generate as much revenue as possible, by seeing which market is better and if a longer period of theatrical exclusivity is in fact helpful for a title's release. Different release strategies for different types of films can help smaller and independent titles to sustain momentum throughout a crowded and competitive industry without impacting the sales of tickets to larger films, which are undoubtedly bringing in more audience members to cinemas, and therefore greater profits. However, different release strategies are nothing new and have existed throughout roadshow releases in the 1950s. At that time, roadshow films "connoted prestige and importance" and used a longer theatrical window to emphasise large scale and specialness (Neale and Hall, 2010, p. 4). Filmmaker Quentin Tarantino even tried to replicate this model with the release strategy for *The Hateful Eight* (2015, USA) by releasing it earlier in a specific 70mm format, before opening wider in digital projections (McClintock, 2015). The differentiation in windows for different formats is something that could extend to different types of films. It does not even necessarily have to be blockbusters, as roadshows "crossed genre lines from historical to drama to musicals and science-fiction," but instead, if larger films which could sustain momentum for a longer theatrical window were to have a longer window than smaller films, it could ultimately connote a similar prestige and importance that roadshows once did (Holston, 2013, p. 5).

In 1918, cinemas were impacted by a global health pandemic at a time when cinemas were the only way to watch a movie. After a century of technological developments and advancements, cinemas remain the primary source of revenue for studios, and the theatrical window has been a tool to provide enough time to generate profits before other release markets like home media and television. The emergence of streaming has challenged the primacy of the cinema, and with it, the length and traditions associated with the theatrical window. In order to ensure lucrative revenues for the films in a future where cinema and streaming are complimentary to one another, differing windows for different types of films would be a beneficial way to secure lucrative revenues overall. The films that do have longer windows would need to be justified, just as roadshow releases were, and cinema chains would need to be open to either a relaxation of policies or operating on a film-to-film basis. The last time the window was reduced in the United Kingdom was in 2006, due to the emergence of DVD and online piracy. In addition, with the window in America being shorter than the window in the UK, at 12 weeks and 16 weeks, respectively, there are calls and conversations for the window to be reduced

further in the United Kingdom, which would help to accommodate a rapidly evolving industry. Between 2006 and the pandemic's arrival in 2020, the advent of streaming, social media, and the internet are factors that continued to significantly change the ways that movies are consumed.

Chapter 5:

The Changing Consumption of Film

The digital switch and the advent of streaming have both had an impact on the distribution and exhibition industries, as well as the practices and business models put in place, like the theatrical window. But these factors have also had an impact on audience behaviours and viewing practices, which have changed and evolved concurrently with these developments. This chapter will track these changes, as well as focus on particular behaviours including fandoms, collecting, and binge-watching. As the next section of this thesis will further investigate cinema-going on a social level throughout Coronavirus, it is important to examine the evolving viewing habits that have influenced the changing consumption of movies before the pandemic's arrival.

Binge-watching is a term used to describe the excessive consumption of film and television and was popularised by the advent of streaming throughout the 2010s. Whilst previous chapters in this section have examined the impact of streaming on the film distribution and exhibition industries, streaming also has a significant effect on audiences, by influencing their approaches and responses to viewership. Moreover, in an interview with *The New York Times* in 2019, Joe Russo, co-director of *Avengers: Endgame* (2019, USA), stated that by binge-watching television shows, audiences are “expecting a greater payoff for their commitment” to watching a film (Buchanan). How audiences have consumed movies has changed drastically throughout the 21st century, from earlier concepts such as repeat viewings, film collecting and home viewings, which Barbara Klinger examined in her 2006 book, *Beyond the Multiplex*, to more contemporary factors that have developed and evolved as a result of emerging technologies and the internet, including fandoms, social media, and online spoilers. In addition, film franchises have also evolved throughout this time, going from sequels and continued stories to cinematic universes and connected stories, such as the *Marvel Cinematic Universe* (MCU, 2008-), which borrows tropes from the television industry. All of these factors have impacted the social aspect of viewership, whether leaving audiences to seek films sooner to avoid plot spoilers or by bringing forward habits of a subculture to mainstream audience practices (Wang, 2019, p. 198).

Lisa Glebatis Perks states that the term binge-watching “saw an explosion in the press,” as it went from zero news headlines in 2011 to over a hundred in 2013 (2014, p. x). The articles themselves expressed a range of concerns over the viewing habit, with some sharing concerns that watching too quickly “reduces anticipation and enjoyment,” whilst others praise binge-watching for fulfilling audiences with what they want. In addition, the term binge itself is more commonly associated and discussed with other leisure, such as binge-drinking or binge-eating, which appropriately refer to the

excessive consumption of unhealthy drinks and food, such as alcohol and junk food, respectively. As Perks continues, it is these connotations of bingeing that often relate to addictive properties, which therefore presents the habit of binge-watching as something addicting and unhealthy. Although binge-watching has been popularised by the advent of streaming throughout the 2010s, whose impact on the film distribution industries has been examined in Chapter 3, these viewing habits have not originated from the streaming industry, but instead have evolved from media marathoning, particularly regarding television. Television marathons have existed since the mid-1980s, as channels like Nickelodeon's Nick at Nite, in America, would block off hours of programming to present multiple episodes of the same programme, such as reruns of *The Donna Reed Show* (1958-1964, USA). It would become more apparent with other networks in the following years, with sitcoms, like *Friends* (1994-2004), and cartoons, like *The Simpsons* (1989-, USA). Perks notes that marathoning grants a stronger connection between viewer and story, allowing audiences to further connect in greater depths, too (2014, p. xi). However, marathoning also existed beyond the reliance on television programmers, as home media, from the popularity of VHS in the mid-1980s to DVD in the late 1990s, provided an alternative method of excessive consumption.

As explored in Chapter 3, home media formats gave audiences the freedom to choose what they wanted to watch, which also meant that they had the freedom to choose what to marathon, too. By renting or purchasing multiple titles, whether on tape or disc, customers can take them home to curate their own viewing programme, which could be anything from an entire trilogy to an assortment of movie genres, or even an entire television series boxset. Perks notes that physical media also promotes convenience, and the ability to fit programming around their scheduling, which again offers a sense of fulfilment that regular, scheduled programming might not incite (2014, p. xxix). Furthermore, the home media industries have also used developing technology to cater to this desire, with DVRs (digital video recorders) and TiVo boxsets allowing customers to record live programming so that it could be watched at their convenience. However, it is truly the advent of streaming, which builds upon the viewing habits of excess and convenience, as well as the use of digital technology, to further enhance the marathoning experience. Marathons on television networks were broken with ad breaks, and physical media required the next title or episode to have been manually played or changed across discs, which are factors that might take away from the engagement between audience and story, especially when consecutive titles are connected stories. Streaming enhances the digital availability of the marathon, by using digital programming and algorithms to automatically play or recommend the next title. Furthermore, streaming companies, like Netflix, have already impacted the film distribution industries with the likes of original films and day-and-date releases, but they were also using digital technology to upend the traditional television release model.

As Justin Grandinetti writes, Netflix's approach to releasing whole seasons of a TV show at once "reshaped the communal television experience," as audiences can consume mass episodes of new shows in binge sessions (2017, pp. 19-22). This differs from the traditional week-by-week release model, as audiences are provided with a full series at the same time and are able to programme it around the convenience of their own lives, without waiting for a weekly network timeslot. It also promotes excessive consumption and further relates to the connotations of addiction discussed earlier and allows a new television show to be viewed as a food buffet, with a customer capable of binge-eating as much as they like. In addition, this all-at-once release model also has benefits for shows finding new audiences, as *Breaking Bad* (2008-2013, USA) creator Vince Gilligan stated that each season of his show had increased in viewership from previous ones, due to back-to-back Netflix streams that have made it easier to catch up than weekend re-runs on AMC, the American network on which it aired (Watercutter, 2013). Moreover, the concept of binge-watching has not only become an "essential part of the Netflix branding" but when combined with the advent of social media, changes the way that audiences participate with television shows (Baker, 2017, p. 44). When all episodes of a series are released at once, social networking sites provide an online space that allows audiences to watch them together virtually, and at the same time, share reactions simultaneously and globally (Grandinetti, 2017, p. 27). Although the traditional weekly model arguably prolongs discourse around a series across a longer period and builds anticipation from week to week, benefitting shows with large fan bases like *Breaking Bad* or *Game of Thrones* (2011-2019, USA), the 'all episodes at once' approach helps to build momentum around shows without established audiences.

Streaming services, like Netflix, use algorithms to recommend the next show, and potential marathon, to users, which could be a new release that does not have a surrounding level of anticipation. This can result in a boosted discussion across a series' full list of episodes online, which ultimately creates a "pseudo-communal viewing experience" with those willing to participate (Grandinetti, 2017, p. 27). Furthermore, Netflix's binge-watching approach is also benefited from the idea of "just one more episode," to which Netflix Engineer Casey Rosenthal adds, the ability to discover what happened next immediately after a minor cliff-hanger in an episode provides a level of instant fulfilment in an audience's brain (in Goldstein, 2013). It is also amplified with a countdown timer approaching an automatic play of the next episode, as it almost challenges audiences to stop watching before the next episode begins. Moreover, the instant fulfilment might have been lost if they had to wait a week to reach that same discovery, which again relates to the connotations of addiction. The popularity of streaming has also made habits like marathoning and binging more of a mainstream activity, when they may have been associated with subcultures and fandoms before streaming's arrival, which will be explored in greater detail later in this chapter. Although these habits of consumption

have been examined with a focus on television series, from networks to streaming services, it is something that can also be observed and discussed in relation to movies. Movie marathoning also builds a stronger connection between story and audience and can consist of watching film franchises, films of the same genre, or even filmographies of actors or directors. This research will examine movie marathoning specifically on film franchises, because, like television shows, they tend to offer a continued story and level of engagement, especially when considering modern cinematic universes. At the same time, before understanding the shifting patterns of viewership throughout the developing 21st-century film industry, it is important to look back and observe where modern film franchises have evolved from.

As explored in the previous chapters of this section, throughout cinema's history, there has always been a desire within the film industry to secure lucrative revenues and boost profits. Film franchises, from sequels to reboots, use familiar characters and story worlds to engage audiences, which has resulted in both a change in viewing habits and an industry desire to boost revenues. Stuart Henderson notes that cinematic sequels expand from the ideas of sequels and serials within literature, such as the serialised fiction of Charles Dickens in the 19th century (2014, p. 10). Furthermore, he notes that historian Umberto Eco called sequels 'retakes' instead, which he defined as "the recycling of characters of a previously successful story in order to exploit them and tell them what they did at the end of the first story" (2014, p. 12). This definition distinguishes the sequel from other narrative forms but also demonstrates how they are often made with financial incentives in mind, and at the same time, pose damaging factors and spoilers to the original story. With regards to cinema, sequels can take different forms and therefore require a definition that expands beyond Eco's. Henderson notes that film sequels can either be a continuation of narrative stories, such as *Star Wars* (1977-) or recycle characters and motifs, featuring protagonists that never age or change jobs, such as the *James Bond* series (1962-). He continues that cinematic sequels therefore require an examination of both its "textual and extratextual factors" which paves the way for a variety of different and interchangeable terminology, including the sequel, the series, the franchise, the saga, and the remake (2014, pp. 10-12). These vary depending on the role of a new film in an existing story, as sequels would continue stories, series would maintain characters, franchises might include spin-off films, and remakes would reintroduce older characters and stories to new audiences. What is constant across all of these terms is a desire for studios to generate profit, or as Eco noted, to exploit, as sequels or other additions aim to replicate previous successes, which has been evident within cinema's history.

Ryan Lambie notes that cinematic sequels are as old as the practice of filmmaking itself (2011). The 1930s, for example, saw numerous sequels, including instalments from Universal horror series, like *The Bride of Frankenstein* (1935, Whale, USA). However, the 1970s marked the period where the

modern sequel began to truly emerge. This period saw the releases of blockbuster films like *Jaws* (1975, Spielberg, USA) and *Star Wars* (1977, Lucas, USA) which saw unprecedented box-office successes that appealed to audiences all over the world, and at the same time, allowed studios to see sequels as a method of extending the life and the commercial potential of a title (Jess-Cooke, 2009, pp. 40-41). For instance, the sequel to *Jaws*, *Jaws 2* (1978, Swarc, USA) did not see the return of director Steven Spielberg but brought back principal characters and most of the cast members to tell an isolated story of another shark attack on the fictional Amity Island. This is similar to Eco's definition of a retake as it "recycles characters" to exploit them for the studio's financial gain. However, not all sequels and franchises were established with the sole intention of earning revenues, as some filmmakers expressed a desire to continue the story for a justifiable reason. For instance, after the success of *The Godfather* (1972, Coppola, USA), Paramount, the studio, approached Francis Ford Coppola to direct a sequel and gave him full creative control despite clashes during the production of the first film. However, Coppola stated that he wanted to ensure that the sequel had a reason to be made that benefited the story, rather than being an appendix after the first, which led him to devise a sequel that went both forward and backwards in time (Jess-Cooke, 2009, p. 42). *The Godfather: Part II* (1974) became the first sequel to win the Academy Award for Best Picture, but at the same time, further highlights the potential of the narrative form as something that can further engage audiences and maintain a strong connection between viewers and story. As years progressed, sequels continued to be made with various intentions, ranging from profits to story, but along with it came changing attitudes by critics and fans.

Throughout the 1980s and 1990s, Henderson notes that the growing number of sequels were seen as a display of the industry's lack of imagination and was often viewed with disappointment by critics (2015). For instance, in a review of *Star Wars: Episode V – The Empire Strikes Back* (1980, Kershner, USA), film critic Judith Martin stated that the sequel had "no beginning or end, just several middle-of-the-story chases" (1980). Whilst *The Empire Strikes Back* did receive other critical praise and went on to be a hugely successful film, Martin's comments do highlight another emerging factor within Hollywood sequels. The first *Star Wars* in 1977 introduced the characters and worlds of the story to audiences, and although it was intended to be a trilogy, it did have a closed ending in case it did not generate the desired revenues. But as it was a success, and a sequel was made, it was more likely that the trilogy would be complete, allowing for more creative freedom that could expand beyond the original (Nathan, 2020). The sequel was an opportunity for George Lucas to also delve further into the characters and worlds that had already been established, which gave viewers an even stronger connection to the story. Furthermore, reconnecting with familiar characters provides a level of fulfilment for audiences, and although it will be explored in further detail later on, it is as if audiences

are catching up with old friends every so often. Furthermore, having characters appear multiple times also has financial benefits for studios, who can capitalise from ticket sales from each instalment in a franchise, which has even led to studios implementing new corporate strategies.

Carolyn Jess-Cooke writes that the studios that produced the early sequels in the golden age of Hollywood in the 1930s and 1940s are now “owned by and operated by international entertainment conglomerates”, such as MGM and Columbia Pictures who were owned by Sony at the start of the 21st Century (2009, p. 7). Companies like Sony were heavily involved in the technological development that also coincided with this time, and alongside movies, produced and manufactured an array of electrical products, from televisions to game consoles. Jess-Cooke continues that sequels play an important role within larger companies like Sony, as they shift the focus towards the commercial output of movies, ultimately leading to media franchises (2009, p. 7). Popular and high-selling electrical products also receive re-releases, new accessories, or a new release of an upgraded version, like Sony’s PlayStation released in 1994 and the PlayStation 2 in 2010. The PlayStation 2 also became the first video-game console with a built-in DVD player that helped to popularise the home video format for movie consumption. Much like these technical successors, successful films are given sequels to help cash in on the success and popularity of the previous film. Franchises became the focus of attention for studios in the new millennium, with new blockbuster releases from popular franchises viewed as “event movies with film packages” in the industry, which allowed for even more corporate strategies to be implemented (Jess-Cooke, 2009, p. 7).

The early 2000s saw several methods for studios to maximise the commercial potential of films and intellectual properties. Sequels were not exclusively green-lit by studios when a film reached success at the box office, but instead, films being adapted from other media with a pre-existing fan base were produced with franchises in mind regardless of the box-office success of the first instalment. For instance, Peter Jackson’s *The Lord of the Rings* trilogy (2001-2003) was adapted from J.R.R. Tolkien’s novel of the same name, which was initially intended to be one text but was divided into three volumes due to economic reasons during the printing stage (Reynolds, 2014, p. 1). The adaptation from novel to film was set out to be a trilogy throughout its pre-production not just because of the vast subject material within the three volumes, but as an attempt for studios to maximise its commercial potential. The studio invested over \$280 million combined to shoot all three instalments of *The Lord of the Rings* trilogy back-to-back, allowing sets to be shared across productions for more cost-effective advantages. In addition, the notion of a trilogy also meant that audiences, in addition to the “already established fan base of over fifty million readers worldwide,” could further engage with the story and characters, knowing that it would continue in the subsequent years (Sibley, 2002, p. 141). This notion also has economic benefits, as if audiences are returning for future instalments, then it is ultimately boosting

profits, and *The Lord of the Rings* trilogy went on to gross almost \$3 billion combined. This strategy of shooting multiple sequels back-to-back was also replicated with other franchises, including *The Matrix* (1999) sequels *The Matrix Reloaded* and *The Matrix Revolutions* (2003, Wachowskis, USA) which were shot over 276 days, in an attempt to save on costs and boost revenues (Sharf, 2020).

However, studios would go even further in an attempt to generate more profits from franchises, especially those whose stories were coming to an end. In 2008, Warner Bros. announced that it would split the final Harry Potter book adaptation into two parts, due to a dense story that needed an extra part to do it justice (Miller, 2009). But after the releases of *Harry Potter and the Deathly Hallows: Part 1* and *Part 2* (2010, 2011, Yates, UK) broke box-office records, other studios were keen to implement similar strategies that split final instalments to share budgets and maximise revenues, such as *The Twilight Saga* (2008-2012) and *The Hunger Games* (2012-2015). However, this strategy did not always pay off, as seen by *The Divergent Series* (2014-2016), which split the final book into two movies but opted out of the back-to-back shoot that other franchises did. When *The Divergent Series: Allegiant* (2016, Schwentke, USA) was released as the penultimate instalment, it was a box-office bomb, which halted the production of the finale, before it was eventually cancelled. The series ended on a cliffhanger, with all plans for a conclusion to the story dropped, which ultimately highlights the importance of fans to a franchise. *Divergent* did not have the level of fandom that *The Lord of the Rings* or *Harry Potter* did, and by studios focussing on trying to maximise revenues, it left *Divergent* fans without an on-screen conclusion to the series. Fandom plays a pivotal role within audience and viewing habits, as they actively aim to strengthen their connection to characters and stories in a variety of ways, including rewatches, hobbies, and discourses.

Whilst the home media market provided additional revenues for titles, as observed in Chapter 3, the popularity and success of a format like DVD, which penetrated 50% of television households in Western Europe in just six years after its 1996 launch, was also impacting viewing habits (McDonald, 2007, p. 59). Klinger argues that home viewing introduces new methods and concepts of watching that have developed alongside and influenced the evolution of sequels and franchises within Hollywood, and ultimately alongside fandom too. For instance, she notes that a large part of the success of a blockbuster is due to repeat viewings. Franchises, like *The Lord of the Rings*, entice as many as 20% of moviegoers to see the film again, compared to just 2% of audiences rewatching non-franchise films, although 1997's *Titanic* and 2009's *Avatar* are exceptions (2006, p. 135). Furthermore, the role of fandom plays an important part in repeat viewings, and Klinger notes that returning viewers tend to be the demographic of teenagers and young adults, who tend to have more free time and disposable income, which they can invest into movies they like. In fact, fans and audiences watching films again share similarities with the early sequel, in the sense that these moviegoers like to rewatch both what

is familiar to them and what they already enjoy. Where sequels reintroduce characters to new situations or continue old series, the joy of rewatching the same film over and over again lies in the opportunity for audiences to extend their level of engagement, knowledge, and passion for a movie beyond a single viewing (Klinger, 2006, p. 136). Moreover, it is an idea that carries over from physical media like VHS, which was “identified with the practice of repetition and [became] a routine household pastime” as viewers would rewatch the tapes they had access to (Klinger, 2006, p. 136). Furthermore, the notion of rewatching movies that you like and enjoy also stems from literature, much like sequels, as John Cawelti notes how often a child “rejects a new story, preferring to hear one [that’s] already been told a hundred times” (1976, p. 135). Rewatches, whether in the cinema or at home, allow audiences to engage with the media beyond a single viewing, but at the same time, offer a way to further maximise a film’s commercial potential.

Jess-Cooke notes that “fans create and continue narrative discourse across formats” which goes beyond rewatches to further demonstrate how the longevity of a movie or franchise can be extended after its release, through methods like collecting, memorabilia and further fan activity (2009, p. 86). When films are often adapted from material with a pre-established fanbase, studios are likely to cater to these individuals, as evident with ‘fan service,’ which might include memorable quotes from the source material. But studios also offer more beyond the material on-screen, as large-scale films tend to have media licenses with collectables, such as toys, video games, clothing, and other memorabilia. This allows audiences to have “real-world items to interact with” that ultimately extend their engagement with the media, and at the same time, further maximise a movie’s commercial profits (Jess-Cooke, 2009, p. 86). Another example of this, outside of memorabilia, would be film collecting, specifically regarding home media, as it offers another way for studios to appeal to audiences and generate additional revenues. For instance, studios might release special collections of film franchises, or even special editions, anniversary editions or extended editions of the same film on home media formats, such as *The Lord of the Rings* trilogy, which had extended editions released on DVD a year after the theatrical releases, and then re-released on Blu-ray in 2011, a year after the standard Blu-ray release, before released on 4K in 2020 (White, 2011). The role of fandom demonstrates an audience’s desire to extend their admiration for the stories, characters, and franchises that they enjoy. It is evident that studios want to cater to them, knowing that they are a market that will help to promote a film, through word-of-mouth and by extending the surrounding discourse, which ultimately boosts profits. But the intersection between fandom and franchises drastically changed following the release of *Iron Man* (2008, Favreau, USA), which would launch the *Marvel Cinematic Universe*, that when combined with the previously discussed ideas of marathoning

and binge-watching, as well as emerging factors like social media, would ultimately impact both studios and the very nature of how films have been consumed throughout the 2010s.

The *Marvel Cinematic Universe* (or the *MCU*) brings characters from Marvel comic books to the cinema, and much like the comics, it allows characters, locations and plots to crossover and develop between series and instalments. For fans, it allows their attachment to beloved characters to grow beyond a single movie appearance, with events from previous films often referenced in later instalments. At the same time, it allows characters to intersect with one another beyond their solo stories in films like *The Avengers* (2012, Whedon, USA), which, as a result, become highly anticipated event films. *The Avengers* grossed just over \$200 million in its opening weekend in America, breaking the nation's record at the time (Barnes, 2012). However, the film also opened a week earlier in other countries in the world, including the United Kingdom, which is something that would not happen in later releases, as will be discussed further on. Marvel Studios president Kevin Feige stated that it was due to an alignment with school holidays and functioned as a way to gauge audience reception ahead of the American release, which resulted in an additional \$300 million gross, for \$500 million in its first twelve days globally (Armitage, 2017). Marvel itself is owned by Disney, and the box-office success of *The Avengers* further highlights the commercial benefits for the studio, which are able to produce not only subsequent, films, and later television series, but tie-in comic books, merchandise, and theme park attractions, too, which allows fans to further engage with the stories and characters. However, it also brings light to another idea, which Joe Russo, who co-directed two of *The Avengers* sequels, would reiterate seven years later, that audiences are "expecting a greater payoff for their commitment" to a story (Buchanan, 2019). *The Avengers* brought together characters from five previous films that spanned a four-year period, from 2008-2012. Throughout this time, fans and audiences were aware of what it was building towards, through news developments, casting announcements, and the revolutionary addition of post-credit scenes, which would directly tease what was coming next, rewarding those who would stay for the duration of the credits. Furthermore, discourses and hype were sustained on social media, and the eventual 2012 release rewarded fans for their commitment to the previous titles. Cheng Lu Wang notes that social media has become the centre stage in the media convergence between studios and fans, as it has drastically changed the way that audiences participate with media, thus making fandom more powerful than it has ever been (2019, p. 198). Movie fans are not only people who participate and engage with media beyond a single viewing but are ultimately "consumers of mass culture," so when a Marvel film, like *The Avengers*, breaks global box office records, it pivots fandom from a subculture to the mainstream (Wang, 2019, p. 198). Studios know the worth and potential that a property can offer, and as audiences continue to invest their time

into subsequent instalments in a film series, it means that studios will want to please them and reward them for it.

Continuing to focus on the *MCU*, it is evident that the studio wants to build to something bigger than ever before. *The Avengers* closes the series' Phase One and unites six superheroes together on-screen, whereas towards the end of the series' Phase Three *Avengers: Infinity War* (2018, The Russo Brothers, USA) and *Avengers: Endgame* (2019, The Russo Brothers, USA), which is yet another instance of Hollywood splitting climatic films into two parts, assembles the biggest comic book cast with 36 heroes in one scene (Mithaiwala, 2022). Furthermore, since *The Avengers* (2012), the *MCU* has grown, attracting many new fans and audiences, as well as continuing to build hype between instalments. *Avengers: Endgame* is an event film that culminates the previous 21 films in the *MCU*, and the fact that it grossed \$1.22 billion globally in just its opening weekend, being the first movie to ever gross over a billion in one weekend, demonstrates the audience's desire to see the film as soon as possible (Rubin, 2019). Wang notes that seeing a film at its opening weekend adds the value of a collective experience amongst other fans and therefore promotes a sense of community (2019, p. 221). *Endgame* received a global release on the same weekend, to not just appeal to a worldwide fan base, but to avoid spoilers leaking online, which is another pivotal reason for seeing a film early. With social media, audiences are keen to share their reactions and opinions to films online, but some are also tempted to share spoilers and reveal details from the movie, which can ruin other people's viewing experiences. To avoid it, some people restrict their use of social media until they see the film, and studios even create specific marketing materials to encourage audiences to not share spoilers, which regarding *Avengers: Endgame* featured the hashtag #DontSpoilTheEndgame (Nicholson, 2019). The online discourse around these event films often has a strong presence on social media, which as a result benefits the studio, as some audiences may want to see the film specifically to avoid being excluded from the conversation, colloquially regarded as 'FOMO' (fear of missing out), a term which emerged from social-networking sites since the early 2010s.

A lot of the fandom behaviour towards these popular franchises and how they have impacted the consumption of movies share a lot of similarities with television, such as fans who hosted viewing parties for the series finale of *Breaking Bad*, as they all share a desire to benefit from a collective viewing experience (Tepper, 2013). Although the film franchise has evolved heavily since the 1970s, the 2010s is a period of key development, from the rise of shared universes and social media, but throughout this time, streaming has also grown and developed, which as a result, has allowed movie viewing habits to crossover even further with television. It is important to add that while research, analysis, and discussions of the television industries falls outside the scope of this thesis, this chapter

will use key moments at the intersection of television and viewership as reference, whilst maintaining a focus on film.

The structure of the *MCU* resembles that of a television series, with almost episodic instalments that continue the story and world. But at the same time, this structure differentiates entirely from television. In the lead-up to 2012's *The Avengers* in Phase One of the *MCU*, the films were released annually, with two in 2011, and by the time of *Endgame's* release, there were 22 films spanning 11 years. On the other hand, television shows typically feature either the weekly episode release format or the 'all episodes at once' approach, which was made popular by streaming. Both models allow audiences to connect with characters on more frequent occasions than the *MCU*, with weekly releases prolonging the connection period. In 2009, Jason Mittell analysed how audiences connect with characters over time regarding TV, stating that weekly releases allow audiences to invest their time and commitment into characters and stories, and over time, they are rewarded with narrative payoffs and memories (p. 435). Mittell continues that people, who have watched a television show over a long period of time, are creating memories with these characters that strengthen their "attention, understanding and amusement" within a programme. It differs when bingeing or marathoning series, as consuming all episodes of a season over a weekend is almost stunting the opportunity to create memories over time. Moreover, with shows like *Breaking Bad*, which grew in audience numbers as the seasons progressed, with viewers bingeing old seasons on Netflix, this marathon effect is not rewarding viewers with the same long-term memories that watching a television show over time enables. This idea relates directly back to the *MCU*, as if a viewer spent the 11-year period watching 22 movies, they would have not just strengthened their attachment and connection to characters, but developed their own memories, whether of moments from the film, or personal experiences of how they watched it. In addition, the *MCU* is also binge-able, as just as *Breaking Bad*, pre-existing titles will attract new viewers watching for the first time. Disney even saw economic appeal in this, as in 2012, it released a special edition collection of Phase One films, which were followed by the other phases, and then sagas (phases 1-3). This not only allowed collectors to add to their collections but also gave new audiences an entry point to the series (Breznican, 2012). These collections function as pre-curated marathons, featuring films and additional materials programmed for audiences to watch. Although this method might aim to attract audiences to generate more profits, from subscribers to new fans wanting to purchase related memorabilia, these growing commitments to film franchises and television series are both increasing the connection between viewer and story and rewarding them for the investment. It ultimately asks if studios are making these films to generate more revenues and profits, or to satisfy audiences with stories and characters.

A franchise terminology that has almost been absent from this chapter, whilst focussing on other terms, has been reboots, where these ideas and questions are also evident. Reboots typically disregard pre-existing stories and continuity, to re-tell new iterations of characters and plotlines, with a new direction, style, and vision. Moreover, a soft reboot reintroduces a franchise to a new generation of audiences and often maintains some of the storytelling of the original as canon. Katie Sola argues that studios reboot, or soft reboot, franchises to bank on previous successes and avoid risks, but this has not always paid off (2016). *The Terminator* franchise (1984-) had several of these attempts, including *Terminator: Salvation* (2009, McG, USA) which flopped at the box office and received mixed reviews. The instalment also did not feature Arnold Schwarzenegger, whose character was an iconic part of the franchise, following his appearances in the original films. However, Schwarzenegger did return for another franchise revival in *Terminator: Dark Fate* (2019, Miller, USA), which gained a greater positive reception. Although *Terminator: Dark Fate* also underperformed at the box office, it highlights a new idea and term that studios are capitalising on, legacy sequels. Legacy sequels are essentially a hybrid of a soft reboot and direct sequel, featuring returning characters from the original iterations joining a new class of characters. This allows the franchise to head in a new direction, almost as an entry-point for new audiences, but at the same time, there is often enough nostalgia to reward returning fans for seeing the latest instalment, and for their commitment to the franchise. For instance, legacy sequels typically feature repeated motifs and famous lines from the original movies, which again highlights 'fan service' from studios, whilst setting up the chance for new actors to helm new trilogies inside familiar franchises. This is evident in other legacy sequels like *Jurassic World: Fallen Kingdom* (2018, Bayona, USA) seeing the return of Jeff Goldblum's character, or the *Star Wars* sequel trilogy (2015-2019) featuring fan favourite characters Han Solo, Luke Skywalker, and Princess Leia among a new wave of original characters. Factors like nostalgia and binge-watching ultimately reward viewers for their commitment and therefore play an important role within franchises. Studios interacting with and rewarding audiences and fans for viewing their properties is a way to further maximise their profits, and it is becoming evidently clear that studios are focussing more on films with a larger potential commercial output. Although, the rapidly shifting dynamic between streaming and cinemagoing practices will be explored in the following chapter, changing and evolving behaviours associated with movie consumption leave us to wonder what the cinema of the future might be.

In conclusion, viewing habits have evolved significantly alongside the technological developments occurring between the 1970s and late 2010s. Behaviours, such as marathoning, re-watches, and film collecting, have gone from activities associated with subcultures and fandoms, to more widely accepted societal behaviours of media consumption. Through factors like binge-watching, which was popularised from the advent of streaming in the early 2010s, audiences are strengthening

their level of engagement, attachment and connection to particular stories and characters. In addition, it also shares the addictive connotations and qualities of other binge activities, like eating and drinking, as audiences are rewarded for their commitment to a television show or film franchise with factors such as the instant availability of the next episode or the knowledge of what happens next. Moreover, a weekly-release model for television, or a prolonged release of film instalments over a period of time, can also have its own rewards, from 'fan service' to the memories obtained from watching characters and stories age over time (Mittell, 2009, p. 435). Furthermore, the evolution of sequels highlights an underlying nature for studios to exploit characters in an attempt to replicate previous successes and maximise the commercial output of a property. Modern franchises and shared universes maintain engagement through both the interconnectivity of titles, and emerging factors like social media, which have further extended and continued audience engagement and discourses online. Furthermore, franchises are dominating the cinema box office, benefiting from audiences seeking a collective viewing experience, but if audiences are expecting a payoff for their investment in a series, what impact does this have on mid-budget movies and films not based on intellectual properties, that arguably will not offer fan service nor give viewers an opportunity to reconnect with characters in the future? Not every moviegoer is a fan of blockbuster films, yet being amongst the most popular titles in cinemas, they occupy a lot of theatrical real estate, meaning that the future might see streaming as the new home for these types of smaller and unconnected movies (Acland, 2020, p. 298).

Audience behaviours and viewing habits have been ultimately impacted by the rapidly changing industry around it. From the technological developments in digital that have introduced new viewing formats that enhance the spectacle of cinema, to the advent of streaming and its efforts to reduce the theatrical window with new release strategies. These have all changed how and why audiences are engaging with films, whether it be an event experience or a chosen pastime. The next chapter, and the final chapter of this section, examines and contrasts both cinemas and streaming, to establish where the industry was, what were the viewpoints held by industry professionals and audiences, and what decisions were made, before the Coronavirus pandemic emerged in early 2020 and saw the closure of cinemas.

Chapter 6:

Cinema Vs Streaming

The previous chapters in this section have explored the technological, economic, and social factors that have been at the centre of film industry developments since its inception. Films have gone from silent pictures to talkies to colour to widescreen and to more contemporary formats that have changed the aesthetic nature of the cinema screen, such as IMAX and 3D. Furthermore, the number of places where audiences can watch films has also grown, with first television and then later home media formats providing alternative windows and additional revenues. Whilst writing in 2007, Paul McDonald notes that these different mediums of movie-watching are competing for the attention economy of audiences, with the industry focussing on how to maximise their profits from multiple revenues (p. 170). However, since McDonald's comments, the growing presence of the internet has paved the way for new release strategies, such as online day-and-date releases and the advent of streaming, which have not only reinforced this assertion but have impacted both the distribution industry and the way that audiences interact with movies, too. Progressing into the year 2000, around a century since the Influenza pandemic in 1918, streaming has positioned itself as cinema's greatest competitor, and become the primary alternative to theatrical consumption.

This chapter culminates this section and will examine the debate and discourse surrounding cinema and streaming, and at the same time, bring forward the key ideas of convenience, accessibility, immersion, and profits that have been at the centre of the preceding chapters, as well as the past century of cinema. Before examining the two pivotal factors which are cinema and streaming, and the roles that they had within the film industry before Coronavirus' arrival in 2020, it is important to briefly recap and observe where both of them have come from first.

Since its inception, cinema has been a way to "solicit pleasure to viewers through an exciting spectacle," but it has also been a tool to generate profits and revenues from ticket sales (Gunning, 1986, p. 384). Following, the introductions of sound and colour in the late 1920s and 1930s, cinema continued to utilise developing technology to "transform the experience of motion pictures" to attract audiences, as evident with the advent of widescreen in the 1950s, then IMAX in the early 2000s. (Belton, 1992, p. 2). These formats also emphasised the spectacle of cinema, as large screens and multichannel sounds created an experience that "everything is larger than life" (King and Krzywinska, 2000, pp. 1-4). Geoff King and Tanya Krzywinska continue that spectacle is as much a core aspect of Hollywood cinema as a coherent narrative, and therefore, the use of emerging technology, from special effects and CGI to transitional fads, like digital 3D, can enhance the movie-going experience.

Cinemas were the only place for audiences to watch movies, but since televisions became available at home in the 1950s, an emphasis on the spectacle has been a key strategy to entice audiences back to the movie theatre (King and Krzywinska, 2000, p. 1). However, technology has also influenced developments in home viewing.

Home media became an alternative method of consumption with VHS in the late 1970s, which would challenge the movie-going experience by offering the freedom to choose what to watch, from the comfort of the home. The rentals and sales of videotapes surpassed the theatrical box office in the United States in the mid-1980s, but cinema and the box office were still the favoured revenue for studios (Gomery, 1992, pp. 276-278). Aljean Harmetz reported in 1985 that an industry analyst found movie theatres were responsible for bringing in 48% of a film's revenue, compared to home video with just 18%. It is around this time when industry professionals saw a film's release as a business model, paving the way for the theatrical window, which decides the optimal length between a movie's theatrical and home release to maximise its revenues, and remains a pivotal factor in contemporary releases. As technology continued to develop, it paved the way for DVD, a universal disc-based format for movies, which launched in 1996. McDonald writes that DVD was able to "penetrate 50% of television households" in just six years following its launch (2007, p. 59), and its growing popularity and revenue potential attributed to a reduction in the theatrical window in the United Kingdom, from around 27 weeks in 1999 to 16 weeks in 2006 (Bakhshi, 2007, p. 1). Another attribute to the window's duration was an increase in piracy, as the early 2000s saw a development in internet and broadband speeds, which meant online viewing, whether video-on-demand or illegal pirating, could be done quicker and easier at home. Coinciding with this were revolutionary movements within digital technology, which would pave the way for streaming in the years that followed.

If cinemas are the intersection between narrative and spectacle, then streaming is the intersection between narrative and convenience. Whilst the cinema screen was the only place that offered spectacle for audiences, home theatre set ups have also evolved alongside technology and aimed to replicate the spectacle of the movie theatre to audiences at home. For instance, televisions have increased in screen size and advanced from standard definition to HD to 4K, as well as developments in surround sound that has increased the audio quality available. Streaming services utilise these home technologies, as well as extend from physical media and the internet to give subscribers the freedom of the former, with the digital availability of the latter. Throughout the 2010s, services like Netflix were pioneering with their strategies and approaches to releases, as well as their subscription business model. It also impacted the viewing habits of audiences, as these strategies and tools promoted binge-viewing and marathoning to wider audiences. However, it was only in 2015 that streaming really began to rival cinema-going, as Netflix produced its first original film, *Beasts of No*

Nation (2015, Fukunaga, USA) and released it directly to their platform globally with a short theatrical window for limited cinema showings at select chains. This led to an array of original films, from critically acclaimed and Oscar-nominated films like *Roma* (2018, Cuaron, USA), to more big-budget genre blockbusters like *Bright* (2017, Ayer, USA). Although these listed titles have had a limited theatrical run with Curzon Cinemas in the UK, other original films, like *Murder Mystery* (Newacheck, 2019, USA), completely bypassed the movie theatre and were released instantly on the platform to audiences globally. Furthermore, due to the growing advancements within 21st-century technology, streaming was able to achieve a release model that was virtually impossible in cinemas in the prior decades, and therefore further cement its role as both a new platform for studios to release movies and a new method for audiences to consume them.

Whether cinema and streaming are opposing factors, or complementary to one another, the discussions surrounding the two tend to primarily focus on revenues and finances. Before establishing where the industry was at the moment of Coronavirus' arrival in 2020, this chapter will examine significant discourses surrounding cinema and streaming that precede, with a focus on the social, technical, and economic implications of them both.

When Netflix began distributing original films in 2015, it marked a turning point for cinema and divided industry professionals, and in the years that followed the conversations only grew. During the 2017 edition of the Cannes Film Festival, Netflix made its debut appearance with two original films playing in competition, *The Meyerowitz Stories* (Baumbach, USA) and *Okja* (Joon-ho, USA). As a result, the festival received an outcry from French exhibitors demanding that all competition films should play in local theatres before streaming, which led to Cannes changing their rules and banning all Netflix and streaming films in future festivals (Keslassy, 2022). Moreover, the 2018-2019 awards season is really when the debate took centre-stage within the industry, as Netflix landed its first Oscar nomination for Best Picture for *Roma*, and throughout months of award campaigning, it appeared that the entire industry was sharing their thoughts on the streaming platform (Bitran, 2019).

One of the most notable viewpoints throughout this period was from filmmaker Steven Spielberg, who argued that because Netflix films are committing to the TV model, by not adhering to the United States theatrical window, and meeting the bare minimum theatrical distribution requirements for Oscar eligibility, that they are essentially TV movies and should be considered for Emmy awards instead (Lang, 2019). Spielberg's comments were praised by some Academy members, but other members disagreed. For instance, filmmaker Joe Berlinger argued that the Academy should aim to stay relevant by understanding the seismic shifts occurring in how people are consuming media, and how future generations will seek a new distribution model, which Berlinger suggested might be:

“a small theatrical release followed up by a global streaming release” (Lang, 2019). These ideas and arguments ultimately bring us back to the theatrical window, which prior to the Coronavirus pandemic, the window stood at 90 days in America, and 16 weeks in the UK, and has always been concerned with finding a balance between keeping a film relevant and seeking as much revenue as possible. The praise for Netflix, and other streaming platforms, is not just restricted to its impact on the movie release model, but also on the entire production process.

In an interview during the awards campaign for *Roma*, Alfonso Cuarón spoke about his decision to work with the streaming company (Tutt, 2019). *Roma* is a Spanish-language film shot in black-and-white and is inspired heavily by Cuarón’s own upbringing and childhood experiences, making it an extremely personal film. Cuarón stated that Netflix saw beyond the commercial limitations of a black-and-white Spanish language film, understanding the idea with a sense of ambition and aggressiveness to support the film, where other studios might have wanted changes (Tutt, 2019). Cuarón spoke about the discourse surrounding cinema and streaming and called them “two different economic models at odds” with each other and stated that the industry would benefit from a productive coexistence between them both. Cuarón added that streaming companies supporting independent and art films helps the “diversity of cinema” when other studios might be focused on high-ticket sale blockbuster films (Tutt, 2019). Cuarón’s views are similar to those of Berlinger and demonstrate a section of the industry that is eager to adapt its release strategies to the ever-changing market. Moreover, it is not just filmmakers with a positive view of a coexistence between cinema and streaming, but also those highly involved with the cinema exhibition industry. The CEO of Vue Cinemas, Tim Richards, stated in an interview that cinemas are not competing with Netflix, but with other entertainment industries, like sporting events and nightclubs (Gibbs, 2016). This is similar to when McDonald stated that different mediums of movie-watching are competing for the attention economy of audiences, but instead demonstrates the role of movie-watching as a whole within society, and in particular, the roles of cinema and streaming (2007, p. 170). Richards views these two economic models not as competitors but as teammates in the battle of getting people to watch movies as their chosen pastime, whether at home or in the cinema.

It is through this lens that cinema and streaming are not necessarily at odds with each other but complementary, and again opens the opportunity for these two economic models to coexist and attract audiences. However, once the lens is focussed further down and entirely on movie-watching as the pastime is when cinema and streaming emerge at odds with each other. The industry’s focus remains on lucrative revenues, and in return, both models have their own features and implements that are aimed to steer audiences in one direction, therefore fuelling the discourse.

From an industry standpoint, one of the main disadvantages and potentially damaging factors of streaming companies, like Netflix, on the distribution industries is the lack of box-office statistics and the release of selective data surrounding the reception of original streaming films. Michael L. Wayne writes that from late 2018, Netflix started selectively publishing viewership numbers for a small number of original titles, with the sole intention of highlighting the popularity of the platform (2022, p. 193). For instance, following the release of *Murder Mystery* in 2019, Netflix tweeted that the film was seen by close to 30.9 million households in its first 3 days, with a spokesperson confirming that views counted for at least 70% of completion of a movie (Roettgers, 2019). At first, this data shows that an Adam Sandler-led film is proving to attract audiences on streaming platforms when some of his recent theatrical releases were considered box-office flops, which highlights how different types of films respond to different economic release models, and a comedy film might be more popular on a streaming platform than in a blockbuster-crowded cinema multiplex. On the other hand, this data can be extremely misleading due to the information not being shared. Although 70% was clarified as the amount needed to have been seen to count as a view, it is still unsure whether these numbers account for repeat viewings by the same user, or if a user restarted the film and played it again. Furthermore, whilst the statistics of cinema ticket sales do not distinguish for repeat viewings or audience walk-outs, streaming's figures surrounding 70% completion invite ambiguity, especially when comparing data between the two.

Moreover, Wayne writes that Netflix also chooses to release data and statistics through top 10 rankings, but this again provides very little data and understanding of how each title is actually being represented by view counts (2022, pp. 202-203). Wayne continues that the lack of transparency between details highlights the transition between old and new media, as for years the standard measurement for the success of a film has been through ticket sales and viewership, and yet, Netflix is not "held to the same standard of independent verification" as others are. As more streaming platforms become available, such as Amazon Prime and MUBI, the continued decision by streaming to not release transparent data for their film releases "further limits the possibilities for a collective understanding" of how cinema and streaming can coexist in the battle for viewership (Wayne, 2022, p. 203). Before streaming grew to the level of popularity it had in the mid-2010s, Sky had been a bridge between these two eras of release models in the United Kingdom. Sky was typically an additional market for a film's release to television subscribers and also offered video-on-demand for other titles. However, Sky also did not release statistics for viewings for individual titles, and the only data available concerns viewing figures for the particular channels. But as these were subsequent releases, there would have already been existing and established figures for a film from its cinema release, which is why the data that would later emerge from streaming is concerning, as it is ambiguous and often the

only available data for certain titles. If streaming data remains behind closed doors, it impacts cinemas and their response to streaming and further sets up these two models at odds with one another, leading both parties to introduce and implement new methods and strategies to steer viewership towards themselves.

The popularity of streaming grew rapidly throughout the late 2010s, as Todd Spangler notes in Q4 of 2018, Netflix gained 8.8 million subscribers overall, which was the highest rate in a quarter in the company's history at the time (2019). As a result, cinemas have introduced new features and aesthetics that combat the appeal of streaming, intending to bring in more audiences. Whilst cinemas emphasise the spectacle over the convenience of streaming a movie at home, their strategies to attract more audiences tend to focus on using technology to enhance the viewing experience. The theatrical viewing experience, with large screens and multichannel surround sound, as well as formats like IMAX and 3D, have also aimed to ostensibly enhance the viewing experience and change the aesthetic of the cinema. Although these formats pre-date streaming, with IMAX first being used in narrative cinema in 2002, they have been repurposed for modern audiences by being more accessible, and with greater emphasis on the spectacle to appeal to moviegoers. However, there have been other attempts at repurposing movie formats to appeal to wider audiences and further enhance the viewing experience, such as 4DX, which was first launched by Cineworld Cinemas in the UK in 2015, after first being introduced in Asia and the USA.

4DX is advertised as a "revolutionary cinematic experience which stimulates all five senses" through the use of water sprays, shaking seats, strobes, scents, and smoke among others (Rose, 2018). However, some of its technology is evident in previous formats, such as Sensurround, which was specifically created for the 1974 film *Earthquake* (Robson, USA) and used recordings of a real 1971 earthquake to create a low-frequency rumble that could be felt, rather than heard, in the cinema screen (Volcler, 2013, p. 41). Although Sensurround was a short-lived gimmick, new formats like 4DX are reintroducing and repurposing these technical effects for new audiences to create a more immersive experience. It also extends from the studies that found "3D accelerated the heartbeat of an audience member more than 2D", and the use of the 'fourth dimension' is an attempt to upscale the impact of the format, demonstrating that it is beyond 3D and 2D (Bjorner et al., 2016, pp. 101-117). Other examples of emerging formats are D-BOX, which again originated in America first before being brought to the UK by Cineworld and featured just the moving chairs aspect of 4DX to enhance the experience, as well as ScreenX, which features a 270-degree screen that takes up three of the auditorium's walls. All of these formats change the aesthetic of the cinema and offer an experience that simply can not be achieved at home. Other technological phases, like 3D, were viewed as novelty phases within cinema, and seen as industry attempts to make profits from "moneymaking gimmickry"

(Grant and Meadows, 2016, p. 134). Steve Rose argued that a format like 4DX tries to immerse the audience more into the movies, just as other formats like IMAX attempt to, yet Rose found themselves often thrown out of the experience, and shifting focus from the actual film to the water nozzle in front of them or the smoke at the front of the auditorium (2019). Whilst these formats are introducing new reasons for audiences to visit the cinema to combat streaming, it also highlights and suggests that IMAX is the only format which has staying power as an immersive viewing technology (2019). The cinematic experience is a significant selling point in the argument for cinema, and yet, the experience can often be filled with distractions, whether in a novelty format or an ordinary showing.

Dan Houssan writes that throughout the 21st century, there has been a rise of “glowing touchscreens and chirping text alerts” from the use of mobile phones in cinema screens, which is both distracting other viewers and “threatening the visual supremacy of film at the front of the auditorium” (2016, p. 89). The mobile phone itself has been integrated within society to a greater extent throughout the 2010s, as a 2020 study showed that 53% of children in the UK owned a mobile phone by the age of seven, with 90% by the age of eleven, with it being deemed a fundamental part of life for most young people (Petter, 2020). The usage also extends to adults, and within cinema, as some moviegoers find themselves unable to restrict use for the duration of a movie, as it relies on “common sense judgements about when and where to use them” (Houssan, 2016, p. 89). As Houssan continues, most cinema chains have implemented strategies to limit usage and therefore prevent distracting others, but these often rely on polite audienceing and peer-policing efforts, such as shushing others or notifying staff themselves. Furthermore, whilst most chains in the United Kingdom present a visual on-screen just before the film presentation, notifying moviegoers to put their phones away and not distract others, there is no guarantee of compliance. With mobile phones such a significant part of day-to-day life, there is no policing on their use at home, and as a result, cinema is bringing the casual behaviours associated with home viewings and streaming.

Writing in 2006, Barbara Klinger notes that the casualness of the home setting has enabled “sloppy aesthetics of television watching,” such as talking and other distracting behaviours to “invade movie theatres” in the first place (p. 4). Moreover, although cinemas enable “attentive watching,” from beginning to end, the home set-up invites discontinuous viewings, such as the ability to pause, rewind and forward through movies. When these ideas are combined with the advancement of technology, which throughout the late 2010s has made high definition 4K televisions, and surround sound systems more accessible and affordable, it has enhanced the quality of home viewing overall. All of these factors, from freedom to comfort and quality, play a fundamental role in the popularity of streaming, and streaming companies have acted accordingly. Although it has evolved to another meaning now, “Netflix and chill” originated as a saying for people to spend their time unwinding with the streaming

platform, with the “chill part not being a euphemism for anything at all” (Rickett, 2015). “Chill” connotes the ideas of comfort that exists within a home, and works towards streaming’s favour, helping to establish Netflix as a legitimate pastime. Moreover, if cinema and streaming were at odds with one another, and battling to be the selected pastime, why should someone leave their home and their comfort, to pay to see a film in a theatre which may feature cramped leg room or hard seats? Furthermore, streaming uses “algorithmic calculations of personalised taste” to recommend films to an individual viewer (Frey, 2021b, p. 38). The implications of this technology mean that streaming services can be more personal to each user, and if they do choose streaming as the movie-watching pastime over cinema-going, then these algorithms can arguably suggest greater and additional content to the viewer’s preference, whereas theatres rely on programming for the masses. The comfort and personalised feeling of streaming are certainly some of the model’s benefits, but it has not prevented cinemas from introducing attributes and factors that can make movie-going also feel more personal and comfortable.

In 2017, both Cineworld and Odeon Cinema chains launched two new exclusive premium viewing formats, VIP and Luxe, respectively. Both Cineworld’s VIP and Odeon’s LUXE feature upgraded recliner seating, enhanced sound, and premium food and drinks, including alcohol, with VIP also offering a buffet-style menu. Both chains rolled out these formats to even more venues in the following year, including Odeon’s renovation of the flagship Leicester Square venue, which costs up to £40 per ticket (Lodge, 2018). Both of these formats have the same principles behind them, comfort, and experience. The recliner seats are trying to not only replicate the cosy home feeling but also add to it, with the spectacle of the large screen, surround sound and premium refreshments, creating an optimised viewing experience. Furthermore, both names, VIP and LUXE, have connotations of elitism and prestige, which relates back to the early ideas of the roadshow releases, which “connoted prestige and importance” that could therefore justify the specific mode of presentation (Neale and Hall, 2010, p. 4). If audiences are choosing between streaming and cinema for their movie-watching pastimes, a format like VIP or Luxe, with an inflated ticket price, could prove to be more of an experience or event, like going to a concert or a live sporting event.

However, different formats are not the only way that cinema chains in the United Kingdom have attempted to combat streaming, as the use of advertisements has also tried to make cinemas feel more personal. Where streaming may benefit from the use of algorithms once subscribers are already on the platform, advertisements playing in the cinema are targeting those who are already seated in the theatre. Each chain has its own motto or tagline that essentially shares the same message, come to the cinema to escape the every day, such as Odeon’s “go to escape”. In addition, cinema chains typically feature ad campaigns to help gain customers, and one notable campaign is Vue

Cinemas' *Get Lost in Great Stories* (2020, Scott, UK) campaign starring John Boyega and Ridley Scott, which was launched in January 2020. The ad features the star power of Boyega as he navigates a film set and digital world as individuals watch films on their phones and tablet devices, with Boyega repeatedly narrating "that's not how to do it." The ad then cuts to black, before showing a cinema screen and emphasising the spectacle and experience, as well as the chance to lose yourself in a story and escape the distractions of the day-to-day world. The use of the cut-to-black ultimately emphasises the impact of the cinema, as streaming can not achieve this sanctuary from distraction, or even stress that might commonly be associated with the rapid growth of mobile phones in society. Moreover, whether streaming and cinema are opposing economic models at odds with each other or two methods of movie-watching that coexist with one another, both of them remain with their selling points that can attract audiences. However, at the same time, both cinema and streaming share similar ideas and strategies, too, including subscription services.

Subscriptions play an important role in both cinemas and streaming. Dana Dunne writes that subscriptions have been around within society for hundreds of years, with milkmen dating back to the 1860s and magazine subscriptions in the late 1800s (2021). In the modern world, they make up an important part of consumer lives, from mobile phone contracts to gym memberships and grocery shopping, creating almost a subscription economy similar to the attention economy McDonald referred to regarding home media formats (2007, p. 170). In the film industry, subscriptions have been evident with television and cable services, as well as streaming subscriptions and how they can change in price based on the quality of the playback or the number of users required. However, cinemas have also introduced subscription and loyalty memberships to their customers, and like streaming subscriptions, these have the same effect on audiences.

In 2005, Cineworld acquired the French cinema company UGC, which had its own Unlimited Card since the new millennium. UGC's Unlimited Card used to cost £9.99 a month and entitled subscribers to unlimited cinema admissions, when the average ticket price was roughly £5 in 2000 (Dawtre, 2000). Throughout the years and the acquisition, the price of the unlimited card, as well as the average ticket price, increased and in 2017, the unlimited card cost £17.90 a month. In 2016, Odeon launched its own version of the pass, called Limitless, which cost between £18-20 per month depending on where it was being used. Other chains, like Curzon, which tend to focus on more independent and foreign cinema, have introduced memberships that, for an annual fee, give free tickets and discounts on refreshments. All of these memberships offered by cinema chains have the same intentions of making audiences return and have a similar effect to something like a restaurant loyalty card, such as Nando's, which rewards customers for return visits with free food. Customers may already have restaurant loyalty cards, shopping promotion cards, like Nectar, and gym memberships,

so a cinema or steaming subscription membership is simply an addition that can motivate how audiences watch movies. Moreover, Dunne states that the difference between a subscriber and a transactional customer is loyalty, with subscribers having higher retention and lifetime value (2021). This provides an additional economic benefit for cinema chains, as it grants them a greater projection of revenue for the future, as statistics can be taken from subscriber numbers, rather than individual tickets and refreshment sales, which are less accurate to predict. Whether a streaming subscriber or a cinema membership holder, both are attempts to steer audiences towards movie-watching as the chosen pastime in this entertainment attention economy, and factors like the subscription model are helping to not only boost revenues but create a more “improved and personalised customer experience, [whilst] saving on costs” (Dunne, 2021). In addition, having movie subscriptions alongside everyday memberships, from the gym to phone contracts and shopping, helps to establish movie-watching as a greater part of everyday, mainstream activities.

Cheng Lu Wang notes that factors like binge-watching and social fandom have helped to transform different viewing habits from a part of a subculture to mainstream social activity (2019, p. 198). Streaming enforces binge-watching and marathoning and has made it easier than ever for people to watch more than they ever have, and cinemas have followed this. The introductions of Unlimited and Limitless cards allowed audiences to personally curate their movie marathons in the environment of a cinema, with an affordable membership, albeit a limited selection. As the late 2010s saw an increase in blockbusters and franchise films related to cinematic universes being released, there became a more accessible and affordable way to watch these films in cinema. Cinemas emphasise the spectacle of the theatrical experience, whereas streaming focuses on the convenience, but both formats intend to get audiences to watch as many movies as possible. As a result, the industry has experienced seismic shifts with new and modern economic models, and rather than having these two models at odds with one another, there is an argument for them to, as Cuarón stated, productively coexist (in Tutt, 2019).

In the late 2010s there have already been new strategies implemented that both accommodate streaming and theatrical releases, which also seek to challenge the traditional theatrical window. As explored in Chapter 4, the theatrical window is a trade between marketing and cannibalisation effects to establish a suitable duration between a movie’s release on different markets. If streaming and cinema are going to coexist as release models, then it could be suggested that different release strategies for different types of films could be implemented, to help favour the marketing effects, and allow titles to generate both profit and attention, with releases in cinemas and on streaming services closer together. In addition, independent films have already tested these new strategies that attempt to find a coexistence between the two. For instance, not only do Curzon

Cinemas play select streaming films before they hit the platform, but also release films with day-and-date releases both in cinemas and online through Curzon Home Cinema, since 2015. Mark Kermode wrote that “simultaneous distribution is the future” and an important aspect of simultaneous releases is the choice that it gives audiences, who have more freedom and control over where and how they watch movies (2015). Choice is a massive concept within viewing, from home media to choosing what film to see in the cinema, and companies are giving more options than ever before. For instance, MUBI may have started as a streaming platform with a hand-picked curation, but since 2017, it has launched MUBI GO, which gives subscribers one free ticket to a selected title in participating cinemas. This gives audiences the option to see it in cinemas, as a benefit of being a loyal subscriber, but if they are unable to, they still have a catalogue of selected films, knowing that the theatrical title might appear on the platform in the near future. Nonetheless, giving audience choices and options prevails as another factor at the centre of the discourse between cinema and streaming.

After looking at over a century of technological developments in cinema’s history, there are a few factors that have remained constants: audiences, experiences, choices, and transactions. Whether cinema and streaming are at odds or coexist with one another, these factors are evident within the industry at the moment before the pandemic’s arrival in 2020. At the end of 2019, the industry focus remained on what audiences were interested in and how companies could maximise their profits.

At the end of Q4 2019, Spangler notes that Netflix continued to grow and add an additional 8.8 million subscribers to a total of 167.1 million, thus demonstrating the popularity of streaming (2020). Therefore, it was only natural that other companies tried to replicate this success and business model, which is why in late 2019, Disney launched their own streaming service called Disney+ in the United States, with further launches in the United Kingdom and other territories in early 2020 (Castillo, 2018). In addition, in 2018 and 2019, Warner Bros and Paramount announced plans for their own platform, respectively. Whilst the discussion of studio-owned streaming services will form Section 2 of this thesis, it does demonstrate and highlight that prior to and regardless of the emergence of Coronavirus, studios were keen to exploit the streaming model to further generate revenues and profits. Richards stated that cinemas and streaming are both competing against other entertainment industries (in Gibbs, 2016), and on a focussed level, cinema and streaming are competing with each other for audience attention, and now on a new, even more, focussed, and refined level, individual streaming companies are competing for subscribers. It is similar in a sense to different cinemas having different memberships and perks, as different platforms offering different intellectual properties and acclaimed titles, are ultimately steering audiences to choose what works the best for them.

However, as different cinema chains typically show the same films, if content is now divided across multiple different streaming platforms, and audiences are required to have multiple memberships, how would this factor into the membership economy and what would it mean for the streaming industries overall in the future?

In conclusion, throughout decades of technological advancements that have shaped both the cinema exhibition, distribution and home viewing industries, there has always remained a focus on profits by studios. Home media has traditionally been regarded as secondary to the primary revenue of the theatrical box office, and any innovation at home, from the advent of television to the popularity of physical formats, has always been responded with an emphasis on the spectacle and specialness of the movie theatre and cinema-going. Studios have also exploited these secondary markets, to further their revenues and establish the power balance between studios and cinema chains. Throughout the 2010s, the growing popularity of streaming has further challenged this power balance, whilst sparking industry-wide discussions and attention to become the main alternative to theatrical consumption that physical media formats and television could no longer offer (Willis and Wroot, 2017, p. 3).

Streaming has granted filmmakers greater creative freedom, provided accessible ways for audiences to watch films, and offered brand new films conveniently to the comfort of a subscriber's home, on a global and instant level. Cinemas have also introduced new technical formats, premium experiences and affordable memberships and subscription passes to combat the appeal of streaming and promote the overall spectacle of the theatrical experience. But streaming and cinema both share a desire to get audiences to participate in movie-watching as their chosen pastime, demonstrating a need for "a productive coexistence" between the two economic models, as Cuarón envisioned, that can benefit and unite the overall film industry (Tutt, 2019). The discourse between cinema and streaming has divided industry professionals nonetheless, with some for it and others against it. However, throughout the divisions, a clear message is formed for the direction that film distribution is heading. Kermode stated that "simultaneous distribution is the future" (2015), and filmmakers like Berlinger have suggested "a small theatrical release followed up by a global streaming release" (Lang, 2019). Both of these views constitute a wider industry perspective to steer away from older traditions and practices, such as the extended 16-week theatrical window in the United Kingdom and move forward with the seismic shift occurring as a result of streaming. Ultimately, the film industry of the 2010s ends the decade with a focus on appropriate practices and strategies for a modern, accessible, and global industry.

By the start of the 2020s, streaming continued to be a significant part of the industry focus, and where it would differentiate from other movements in home viewing. Rather than combat

streaming to solely emphasise the spectacle of cinema, studios have paved the way for another opportunity to exploit the viewing method, with the introduction and announcements of studio-owned streaming platforms. Throughout this section, there has been an evident power balance between studios and cinema chains, but these announcements shift the focus on to a new relationship, between studios and streaming. This relationship creates more opportunities for audiences to watch films, and new methods for releases generates more profits for studios, and at the same time, invited further calls for the theatrical window to be reduced, whether in the following months, years, or entire decade. But this would drastically change in March 2020 with the Coronavirus pandemic. It was the first time that theatrical consumption had been affected at a time when going to the cinema was not the only way to watch a movie, and the relationship between studios and theatres was not the only power balance in the film industry.

As this research arrives at the eve of the Coronavirus pandemic's arrival, it does so in light of decades of technological advancement and industry development. Factors such as the evolving spectacle of cinema, the advent of streaming and the shifting attitudes in audience behaviours have created a new industry situation and landscape in early 2020. The next section of this thesis will explore the significant impact that the pandemic had on the industry at this time, focussing on the historic closures of cinemas, the industry-wide decisions that were made, and how audiences responded. The research on the 2020 situation will be framed against the backdrop of the historical developments that preceded it, to aid in a better understanding and analysis of contemporary events. This will help to understand whether or not the emergence of the Coronavirus pandemic was a catalyst to accelerate the necessary change towards a more modern future for the film industry.

Section 2: Covid and Beyond

The first section of this thesis analysed key movements from cinema's history to establish where the industry was at the moment of the Coronavirus' arrival in 2020. Throughout the history of movie-going, studios were exploiting the theatrical experience to generate revenues, evident with the development of technology and introductions of viewing formats that emphasised the spectacle of the cinematic experience. Studio's prioritised theatrical releases as box offices revenues were the most lucrative, thus forming the relationship between studios and exhibitors at the heart of the industry. But cinema was not the only way for audiences to watch movies, as the introductions of television, physical media formats, like VHS and DVD, and streaming have provided alternative methods for film consumption. In addition, models like the theatrical window have been used to ensure that these other markets are secondary to the preferred box office revenues. But it is streaming's emphasis on convenience for audiences, creative freedom for filmmakers, and the reliable metric of a subscriber for studios that have posed the biggest threat to cinema-going. By the end of 2010s, streaming was at the centre of industry discourse and focus, and studios have announced plans to introduce their own platforms to boost their revenues even further and pose a threat to their historic relations with theatre owners.

As the pandemic emerged in early 2020, it historically brought a closure to cinemas and for the first time in history, at a moment when cinemas were not the only way that audiences had to watch films. The next section of this thesis follows the events of the pandemic as it unfolded, analysing the decisions made by studios, exhibitors, distributors, and streaming companies as a result of the situation inflicted by the virus. With studios continuing to maximise their profits during this time, how would it impact the relations and power balances at the heart of an industry at a time when it was forced to stop? This section brings forward key ideas and discussions surrounding cinemas past to remediate it into an analysis of the events that unfolded as a result of the pandemic. Cinema and streaming were two significant models before the pandemic emerged, but as cinemas shut down during Coronavirus, what does it mean for the future of the exhibition and distribution industries?

Timeline of Key Events

Date	Event
31 st December 2019	First reported case of Coronavirus in Wuhan, China
29 th January 2020	First reported case of Coronavirus in the United Kingdom
9 th February 2020	The 2020 Academy Awards
4 th March 2020	<i>No Time to Die</i> is delayed from its initial 3 rd April 2020 release to November 2020
March 2020	Cases in the United Kingdom grow
11 th March 2020	Covid-19 officially declared a pandemic by WHO
16 th March 2020	Cinemas close
23 rd March 2020	National lockdown announced, stay at home effective immediately
23rd March – 24th June 2020	The first lockdown
24 th March 2020	Disney+ launches in the United Kingdom
15 th June 2020	Non-essential retail reopens
24 th June 2020	Cinemas and other leisure can open in line with government guidelines
4 th July 2020	Odeon and some independent cinemas reopen
31 st July 2020	Cineworld reopens
26 th August 2020	<i>Tenet</i> is released in cinemas
September 2020	Universities reopen and cases of Coronavirus grow
2 nd October 2020	<i>No Time to Die</i> is delayed from November 2020 release to April 2021
5 th October 2020	Cineworld announces it will close all cinemas by the end of the month
31 st October 2020	Government announces a second lockdown, all other cinemas to close
5th November – 2nd December 2020	The second lockdown
2 nd December 2020	Cinemas partly reopen
8 th December 2020	First vaccine given to a patient
16 th December 2020	Government introduces tier system
19 th December 2020	London enters Tier 4; cinemas are forced to shut in the city
4 th January 2021	A third nationwide lockdown is announced
5th January – 27th May 2021	The third lockdown
25 th February 2021	<i>No Time to Die</i> is delayed from April 2021 release to September 2021
12 th April 2021	Non-essential shopping and outdoor dining reopens
27 th May 2021	Cinemas and other leisure reopen in the UK
9 th July 2021	<i>Black Widow</i> is released in cinemas
30 th September 2021	<i>No Time to Die</i> is released in cinemas

Chapter 7:

Cinema and Coronavirus

Coronavirus, also referred to as Covid-19, emerged from Wuhan, China after first reports on December 31st, 2019, and subsequently spread to over 200 countries, infecting over 600 million people, and resulting in over 6.5 million deaths globally in the next two years (Rizzo and Nirappil, 2022). It was not something that government or healthcare officials could truly predict the trajectory of, as on March 3rd, 2020, the UK Health Secretary advised that the “UK public should carry on as normal for now” (Pidd, 2020). However, not even three weeks later, Prime Minister Boris Johnson announced a nationwide lockdown after growing cases of Coronavirus, which would severely impact and restrict the day-to-day lives of the public. Laura Hughes writes that the 2023 Covid Inquiry revealed that the lockdown was imposed too late and if it were imposed on March 3rd then “fewer than a tenth of the number of people would have died in the first wave” (2023). At the time, there was no finite idea of when these restrictions would lift, as advice and announcements would typically use phrases like “for now” or “at least this long”, which meant that the industries forced to pause or adapt, could not accurately plan nor prepare for a return to normality (Sullivan et al, 2020).

One of the many industries affected was the film industry, as cinemas in the United Kingdom shut on March 16th, 2020, with other countries in a similar situation globally. After a century of gradual advancements, the film industry was at a sudden standstill, as productions were also forced to close down to control the spread of the virus. It was over two months later, at the end of May 2020, when the first productions were given permission to resume filming, following new safety rules and protocols (Wilson, 2020). In the UK, the actual pandemic would span almost two years, where throughout this time, the Government introduced multiple lockdowns and implemented social-distancing measures to combat the virus. This was a turning point for the film industry, and by examining how industry professionals and studios responded to the pandemic as it unfolded, from the decisions made to practices implemented, it can help to understand what the role of cinema will be in the future. This chapter explores the closures and reopenings of movie theatres, the types of films being produced during the virus, as well as public attitudes, to understand if Covid was a catalyst for industry change, or simply accelerated factors that were already developing before the pandemic arrived.

The first reported cases of Coronavirus occurred on December 31st, 2019, from several pneumonia cases in Wuhan, China. The cases directly originated back to a seafood market where wild animals, such as bats and snakes, were traded illegally. Matt Reynolds and Sabrina Weiss write that although the market was closed the next day, January 1st, 2020, it was still enough time for the virus

to spread and be transmitted between humans, as medical staff dealing with the initial cases were also infected (2020). Reynolds and Weiss continue that coronaviruses in general are a large group of viruses that are known to “infect both humans and animals,” and in humans have typically caused respiratory illnesses ranging from common colds to more serious infections. The symptoms of Covid included fever, cough, weakness, headaches, sore throat, and shortness of breath, and it was typically transmitted airborne from coughing (Spiteri et al, 2020, p. 3). Throughout January 2020, the virus spread at an alarming rate, but due to “disastrous coverups over cases” in China, as well as delays from the World Health Organisation (WHO), it meant that it was only on January 30th, when Coronavirus was declared as a public health emergency (Supuran, 2021, p. 291). Although the virus emerged in China, open borders and international accessibility meant that the virus could spread across the globe rapidly, which meant by the time WHO declared it a public health emergency, there were already reported cases in other countries, including the United Kingdom on January 29th.

The end of January to early March 2020 was a period of limited testing and surveillance, meaning that figures and case numbers were often underestimated (du Plessis et al, 2021, p. 2). Tetyana Chaiuk and Olha Dunaievskia note that throughout this time the media coverage of the virus was unprecedented, and unlike any other virus, as it “dominated the news cycle” (2020, p. 187). Kathleen Kendall-Tackett notes that how people experienced Covid-19 was comparable with how people experienced the Spanish Flu over a century ago, due to both pandemics impacting on a large and global scale (2020, p. 1). However, as noted in Chapter 1, the reporting of the Spanish Flu was often practised with “an alarming level of self-censorship” and the European press avoided concerning headlines to maintain public morale (Shapiro, 2020). In over a century between the two pandemics, technology has advanced significantly, and social media, global news and knowledge have become more accessible than ever. As Coronavirus was emerging, it would have been more difficult to report it with a level of self-censorship, due to the developing nature of how people can gain information. However, after Chaiuk and Dunaievskia examined the reporting on Covid in the United Kingdom, they found that it often used language to “construct the discourse of fear” in readers (2020, pp. 187-190). For instance, they note that alarmist phrases like “highly contagious,” “infecting” and “killing” were typically used to bring attention to how the virus could pose a threat to everyday British life. Moreover, throughout January and February 2020, while the virus was predominantly apparent in China, British newspapers, such as the *Daily Mail* and the *Daily Star*, reported on the virus as if it were “a monstrous living thing”, using language such as “the virus has broken out of China and could already have arrived in the UK”. It is similar to the reporting and response of the 1918 Influenza, and how it othered the Spanish population, as observed in Chapter 1, but instead, the reporting of the 2020 pandemic was essentially vilifying China for the outbreak. The use of fear language and warnings of extreme

hypothetical scenarios, as well as the consistent use of “could” in headlines, were attempts to create a level of heightened anxiety to prepare the public for what was to come, yet the world industries and borders, including the film industry, continued to remain open.

Despite numerous cases in the UK, the BAFTAs still took place in early February 2020, with nominees travelling to America the following week for the Oscars. As cases continued to grow on a global level throughout February and early March, Sophie Borland et al. note that alongside it was a growing “atmosphere of insecurity, threat and anticipation of the worst” (2020). However, there were still no official government lockdowns or measures to limit the cases, further adding to the anxiousness created by the reporting, which affected societal behaviours.

Borland et al. note that early March was a critical period in Britain, as there were no guidelines, despite increasing surges in cases of the virus each day (2020). However, they continue that Britons were concerned with the growing scale of the outbreak and took it into their own hands to prepare for what could come, noting “signs of panic buying” and the use of “makeshift masks on public transport” to avoid catching Covid. This anxiety extended beyond daily habits and emerged within the film industry, where the extent and potential impact of the virus was becoming more apparent. On March 2nd, 2020, tickets went on sale for *No Time to Die* (2021, Fukunaga, UK), the final appearance of Daniel Craig as James Bond, for a release a month later, on April 3rd. However, just two days later, there were rumours that the movie’s release might be brought forward by the studio, to prevent any damage to the box office due to the spread of the virus (Addo, 2020). But this did not prove to be the case, as, on the same day, MGM and EON Productions announced that the film would be postponed until November, as cinemas were closed in China and other severely hit countries, like Japan and South Korea, which could impact the box office (Lang, 2020). As cases continued to surge in other countries, the idea of more cinemas being closed, especially in Western markets, became a growing concern for other studios with forthcoming releases. Although Covid’s impact on film releases will be examined in greater detail in the following chapter, it does highlight how the state of heightened anxiety was impacting the film industry, as Jeremy Kay writes that every studio in Hollywood was “scrambling to assess the impact of Covid-19” (2020).

Following Bond’s postponement, other films were also delayed, including *Peter Rabbit 2* (2021, Gluck, UK) to September 2020, but these remained hopeful postponements, as there was no certainty of what the situation would actually be like then. On March 11th, the World Health Organisation officially declared Coronavirus a pandemic after already resulting in 4,000 deaths (Miller, 2020). This declaration would further reiterate the concern about the virus, one that was more fearful than hopeful, as Cineworld responded that it could collapse if the virus meant closures for up to three

months (Foy and Utley, 2020). The virus had no visible expiration date, and cinemas were already facing film delays and postponements. As a result, the stock and shares for cinema chains were dropping, including Cineworld, which plummeted to their lowest level in over a decade (Foy and Utley, 2020). As cases of Covid continued to surge, the Government announced new public health advice to limit contact with the virus, and subsequently, “huge numbers of cinemas across the UK and Ireland” decided to shut on March 17th, including Odeon and Cineworld (Pulver, 2020a). It was a period of uncertainty, of wondering when cinemas could reopen, how staff could be supported, and how the industry could sustain itself. Phil Clapp, the chief executive of the UK Cinema Association, stated that cinema venues faced an “unprecedented challenge to their existence” and the priority should focus on how the thousands working in the sector were helped through it (Pulver, 2020a).

On March 23rd, the British government announced a national lockdown, closing workplaces and schools to further limit the spread of the virus, and forcing the public to stay at home. Cinemas, the film industry, and the entire world had shut down and entered an unprecedented period of uncertainty.

The national lockdown in the United Kingdom, alongside similar measures introduced and implemented in other territories, saw the global closure of cinemas, shutting down of productions and stay-at-home orders implemented. This introduced a period of halting within the industry, which juxtaposes the constant advancements in technology that were observed throughout the first section. But whilst movements like the transition from celluloid to digital accelerated the “dispersion of the filmmaking practise away from Hollywood,” the pandemic also incidentally led to this outcome and levelled the playing field further (Gaut, 2009, pp. 75-76). For instance, whether it was an independent film or big studio production that was shut down, they were both experiencing the pandemic for the first time, and both were forced to their residences simultaneously, thus impacting roles in numerous stages of production, as well as the distribution and exhibition industries. Moreover, as a result of the pandemic’s arrival it resulted in the displacement of many film industry professionals from their sets and offices to their homes. Whilst some could work from home, such as post-production roles, cinema staff were placed on furlough, which is a temporary leave due to special circumstances, in this case, Coronavirus, that offered income through a government-backed scheme. Jobs and workplaces were in a precarious situation.

Andrew Pulver writes that employees of Odeon and Empire Cinemas in the UK were placed on furlough, allowing them to receive 80% of their pay (2020b). It was also the case for companies, such as Disney, who furloughed employees between March and May 2020, and while the government also introduced the Coronavirus Job Retention scheme, the cancellations of film sets meant that many crew

and production workers, the majority of which are freelance or self-employed, were without work and help from the government's initial set of measures (Pulver, 2020b). Manori Ravindran notes that, in total, 350,000 people working in the creative industries were furloughed, which is half of the total working in the sector (2020). It was only in July 2020 that the UK Government unveiled a £1.57 billion support package for the arts sector after months of union lobbying, demonstrating a lack of support from the government for the arts, which was also evident with the lack of government guidance for the arts in regard to the 1918 Influenza. It is important to remember that Coronavirus was still claiming many lives during this time, and by July 2020, the national death count was just over 50,000. Moreover, cinemas were also still unsure when they could reopen, with Cineworld CEO Mooky Greidinger stating that it could only occur when the "US and international markets [were] back in action too" (Tartaglione, 2020). However, despite the industry being at a standstill throughout the first lockdown, there were continued developments within technology that allowed the industry to adapt slightly during the pandemic.

As examined in the first section of this thesis, digital technology sought to enhance upon previous versions, and throughout Covid and lockdowns, digital was used to enhance what has been possible at home. Whilst the true role of streaming services during this time will be explored in greater detail in the subsequent chapters of this section, companies like Pixar were able to continue working on productions at home, as most staff had access to technology equipped to handle the workload (Desowitz, 2020). Moreover, online platforms like Zoom were also changing the industry, as well as society, allowing people to stay connected with both each other and their livelihoods. Zoom is an online video-conferencing app, and Rupert Neate writes that on the day that the lockdown was first announced in the United Kingdom, it was downloaded 2.13 million times globally (2020). Whilst the application was used by schools, offices, and other workforces during the pandemic, it was also used by the film industry in several ways, from meetings, castings and even filming. For instance, during the first lockdown, filmmaker Rob Savage directed the horror movie *Host* (2020, UK), which was both set in and shot entirely using Zoom (Fordy, 2020). Tom Fordy continues that the movie was made at a time when the industry was "still scratching its head over how to proceed" with the pandemic when *Host* used both technological advancements and global limitations to "build an infrastructure for a new way" to make films. Furthermore, during filming Savage, along with special effects technicians and camera operators, used the application to instruct remotely, which further demonstrates how technology has advanced to a level that can produce films without being in the same physical space. Prithwiraj Choudhury writes that before the pandemic arrived, digital connectivity had advanced to a level that made people wonder if offices were essential for work, and now Coronavirus has proven that "entire workforces can perform well working from anywhere," which extends to film productions, too

(2020). Furthermore, *Host* was not the only film made using an online platform or under social distancing measures. As the pandemic continued into multiple lockdowns, other films were also produced, and later released, that adapted to the new situations and circumstances surrounding them.

Throughout the first lockdown, the government implemented new protocols to aid in the easing of social distancing measures, which would incidentally benefit film productions. As Covid tests became more available in May 2020, it saw the roll-out of track and trace, 14-day isolations if exhibiting symptoms, and social bubbles. Rowena Mason et al. write that social bubbles tackled the issues of “social isolation and mental well-being” that the pandemic impacted, by allowing multiple households to mix and for close family and friends to reconnect with one another (2020). For film productions, the bubble offered a way for filming to continue, by limiting cast and crew members to a certain number and isolating them from the rest of the world throughout the production. One of the first Hollywood features to achieve this was *Malcolm & Marie* (2021, Levinson, USA), which features two actors and one location. The movie was shot during the first lockdown in June 2020, whilst Coronavirus cases continued to grow. Brent Lang writes that the producers went to “great pains to keep the set Covid-free,” including regular temperature checks, ensuring no more than twelve members of crew on set at any time, and having actors do their own makeup (2020b). These measures continued in other movies and productions beyond *Malcolm & Marie*, and throughout the virus’s two-year period, they evolved as more situations would reopen.

As larger productions and studio lots were slowly reintroduced, these productions also followed strict guidelines, Covid monitoring, and safety protocols, allowing more numbers of crew on set. However, any positive case of the virus, meant that production would have to shut down and the crew forced to isolate, and in December 2020, a leaked audio of Tom Cruise surfaced where he was heard shouting at crew members for not following protocols on the set of *Mission: Impossible – Dead Reckoning – Part One* (2023, McQuarrie, USA). Cruise stated that the “industry is shut down and hurting, and people are losing their homes” after warning to fire the crew members if their behaviour was repeated (Fleming Jr., 2020). Although this occurred at a time after cinemas reopened, which will be discussed later on in this chapter, it does highlight two points that arise from these Covid-enforced and adapted film productions. Firstly, with cinemas either shut or reopened precariously during the time of filming, it was unknown what cinema’s state would be by the time of release, and therefore, if a movie would even see a theatrical distribution. *Malcolm & Marie* was acquired by Netflix for \$30 million during production, meaning that the filmmakers would have known there would be an audience within the service’s subscribers, but this might not have been the case for other titles and productions (Lang, 2020b). Secondly, on an economic level, the new Covid measures on sets brought an additional cost to productions. Producer Jason Blum stated that the pandemic is adding an extra

“10 to 20% of the production cost”, due to the costs of PPE and other required equipment, which might be unfavourable for smaller productions (Pearson, 2020). Both of these demonstrate not just a desire to adapt to new circumstances, but a need to continue forward despite the obstacles and sustain the film industry. The pandemic may have impacted budgets and protocols, but as lockdowns continued, it also began to impact the subject matter of some of the films being produced.

Throughout the pandemic, there were several films that featured Coronavirus, which immediately differentiates from the coverage of Influenza on film over a century beforehand. For instance, the film *Locked Down* (2021, Liman, USA) is centred around a heist of Harrods set during the pandemic and was released in the UK in March 2021, in the middle of the third lockdown, where the film gets its title, and at a time when the nation’s death count from the virus was around 200 a day. The movie itself had limited resources and underwent the same Covid protocols as many other productions of the time, but it also had its benefits. As Chris Lee writes, the department store Harrods has never allowed “a film to shoot within its walls” in its 172-year history, but with the store also shut down, as the retail industry remained with the same uncertainty that faced the film industry, *Locked Down* was granted permission to shoot (2021). The film was eventually released directly to PVoD in the UK and met with mixed reviews, with Erik Nielsen criticising the “tone-deaf pandemic crime caper... that no one needed” (2021). Moreover, the film *Songbird* (2020, Mason, USA), a dystopian science-fiction film, follows a mutated variant of Coronavirus in the year 2024 was released in December 2020 on PVoD before arriving on Amazon Prime in the UK shortly after. The movie received negative reviews, with Alonso Duralde writing that it uses the current tragedy of the pandemic as a starting point but never “creates something provocative or interesting or at least competent to justify it” (2020). This suggests that whereas films like *Host* have used the situation to make something innovative, other films like *Locked Down* and *Songbird*, which directly used the virus as a key component in an otherwise typical and uninventive film were almost distasteful and perhaps too soon. *Locked Down* even features a scene where Anne Hathaway uses pots and pans to clap for the NHS, an activity that occurred between May and July 2020 for the British public to “display their support for frontline and social care workers in the first national lockdown” (Manthorpe et al., 2022, p. 1442). With the virus still claiming two hundred lives a day at the time of *Locked Down*’s release, it was almost parodying the ongoing frontline efforts and response to the virus. This contrasts with the 1918 Influenza, which was only featured in one informational film, *Dr. Wise on Influenza* (1919, Best, UK), despite resulting in 200,000 deaths in the country. As explored in Section 1, Susan Kent argues that the public were collectively experiencing post-traumatic stress disorder, following the loss of life from the First World War and now the Influenza, and therefore it suggests that the lack of films was an effort to maintain morale (2009, pp. 3-4). Coronavirus claimed extremely high numbers of lives a century later,

and yet, there were numerous films made during the pandemic and about the virus, and it is in the criticisms of the latter, for being tone-deaf and too soon, that reiterates the importance of morale, as well as the role of cinemas, in the present day.

One of the primary roles of cinemas is to enable audiences to escape their day-to-day life, and throughout a century of technological development, factors like colour, sound, widescreen, and IMAX, have emerged and attempted to create a more immersive and astonishing experience to achieve this. With Coronavirus, movie theatres were shut down, and whilst existing films could still provide an escape, new releases were typically released directly to streaming services or personal devices with PVoD, which is examined in greater detail in the following chapter. With films like *Locked Down* and *Songbird* featuring the virus and being released within Covid's active timeline, it does not achieve this level of escape but rather function as a constant and unnecessary reminder of the surrounding situation. Moreover, the pandemic in the United Kingdom featured three lockdowns, and with it, followed three attempts at reopening cinemas, and although the reopening efforts will be discussed in greater detail later on in this chapter, it is important to observe and note the titles that were released during the reopenings.

The first reopening was in July 2020, after a four-month period of closures, and featured the release of the mid-budget action thriller *Unhinged* (2020, Borte, USA), ahead of the release of *Tenet* (2020, Nolan, USA) a few weeks later. A statement from Cineworld during reopening even noted additional future releases that movie-goers could look forward to, including *Mulan* (2020, Caro, USA) and *Wonder Woman 1984* (2020, Jenkins, USA), and also reiterated the uncertainty that loomed with reopening, which was "subject to UK government restrictions and final confirmations" (Dalton, 2020b). What is apparent from the first reopening is that cinema chains were reliant on blockbusters to bring back audiences. Not only do these types of films utilise technological formats and narratives to offer escapism for audiences, but before the pandemic, they were also the films that grossed the most at the box office. Both of these factors offer cinemas financial support, especially after a period of extended and unforeseen closures. *Tenet's* August 2020 release, as the first post-Covid blockbuster, was hoping to be the first film to draw audiences back, but it was arguably damaging to movie theatres too. Guy Lodge writes that *Tenet* grossed £235 million globally after six weeks, but whilst that was a release in the middle of a pandemic, others saw it as "borderline disastrous for the studio", as the film had a production budget of £154 million, and previous Christopher Nolan films had grossed considerably higher at the box office (2020). *Tenet* truly set the precedent for the box office of a Covid blockbuster, which was considerably lower than pre-pandemic levels, and resulted in studios feeling less confident in releasing other titles.

Whilst *Mulan* and *Wonder Woman 1984* were two movies advertised as something to look forward to, the precarious nature of the virus meant that their releases were uncertain, as *Mulan's* release was eventually pushed to Disney+, which is explored in greater detail in the following chapter, and *Wonder Woman 1984* delayed shortly after, as a result of *Tenet's* performance (Sweney, 2020). Alex Ritman writes that British cinema owners were awaiting the blockbuster that followed *Tenet*, as although it did not perform to pre-Covid levels, it did bring back some audiences, who were now in "need of a new supply of films" that did not come (2020). Furthermore, Nancy Tartaglione writes that studios postponing titles on a weekly basis resulted in a "virtually tentpole-deserted calendar" for the last few months of 2020 (2020b). Tartaglione adds that Cineworld CEO Mooky Greidinger decided to close all Cineworld venues as a result in October 2020, weeks before the British Government would announce the second lockdown that would force all venues to close (2020b). Greidinger stated that operating a cinema was costly, and with revenues considerably lower, having no blockbusters with certain releases made it even more difficult. In fact, when cinemas reopened the second time in December 2020, the movies that were playing were the same ones showing when theatres closed in October 2020, as well as some new smaller films, like *Dreamland* (2019, Joris-Peyrafitte, USA), as they awaited *Wonder Woman 1984's* postponed release a few weeks later. However, Cineworld decided not to reopen during this time, as Greidinger stated that reopenings would need to have "a clear lineup of movies" and not a solo blockbuster, as the second reopening remained just *Wonder Woman 1984* (Tartaglione, 2020b). It appears that each reopening attempt began by exhibiting smaller films first, to almost trial the return of cinema, and discover the willingness of audiences to come back. Sarah Whitten reiterates the point that theatre owners were desperate for studios to release blockbusters to bring audiences back but instead were primarily met with "low-budget dramas and a handful of romantic comedies" (2020). For Cineworld, this was a risk that they were not willing to take, but it was one that studios could. If these smaller films did not perform well, then it is a loss that studios can deal with, but if a blockbuster underperformed it could have significant implications for the future of the industry's box office. This remained the case for the third attempt to reopen cinemas in May 2021.

The third reopening followed a five-month period of closures between late December 2020 and May 2021, and the films that opened then were blockbusters like *Godzilla vs. Kong* (2021, Wingard, USA), which was already released under PVoD during March 2021, but also new releases to pre-existing franchises produced for medium-sized budgets, such as *Peter Rabbit 2* and *Spiral* (2021, Bousman, USA). All of these films offered audiences escapism, but now with a variety of genres and appeal, and could also test the waters for future upcoming blockbuster releases like *Black Widow* (2021, Shortland, USA), to attempt to understand what the box office projections and audience attendance figures could be. The impact of the films released in cinemas during the reopenings demonstrates the risk of

moviegoing in a pandemic, on both the box office and for the cinema owners. But before these financial risks are examined, it is important to understand the health risk that was also posed to audiences and differed in each reopening attempt.

Sasha Mistlin writes that the end of each lockdown was a period of heightened fear and anxiety, with the return to normality being a potential trigger for mental health conditions, especially after extended periods of instructions to stay at home and away from others (2021). Moreover, schools and workplaces would often return to staggered start and end times to both combat the further spread of the virus and to accommodate those dealing with post-lockdown anxiety. Precautions and measures were also implemented within cinemas for the reopenings of venues at the end of each lockdown, to combat the same anxieties. In the lead-up to the first reopening in July 2020, Leo Barraclough writes that according to research, one in five British people stated they would be willing to go to a movie theatre when they first reopen, but three out of four would only do so when social distancing and rigorous cleaning were ensured (2020). The cinema screen itself is an indoor venue designed to accommodate multiple people in adjacent rows of seats, so it is evident that venues would have to adapt and implement new measures to help make movie-goers feel at ease. Firstly, some auditoriums ran at as low as 25% capacity, with some chains blocking off the adjacent seats to booked tickets, or others even blocking off whole rows entirely. In addition, although masks, handwashing and hand sanitising are encouraged, cinemas did not actually require mask-wearing in the screen as Phil Clapp stated that “the desire is to make cinemas safe and not like an emergency ward” (de Semlyen, 2020). In addition, cinema food and drink were available to purchase, but could only be consumed in the screen, and there were additional efforts made to stagger the showtimes to avoid congestion in the foyer and toilets.

However, Covid was still an airborne virus and if masks were only encouraged, then Coronavirus could still possibly be passed on within the auditorium, especially if some chains did not block off whole rows to limit the distance between adjacent rows. To combat this, all venues would increase their level of cleaning after each film showing, which differed between chains. For instance, Vue sprayed each screen with cleaning chemicals, the BFI Southbank equipped each screen with full fresh air systems, which do not recirculate air, and as Gene Maddaus writes, some invested in “mistifiers, foggers and untold volumes of chemicals” to cleanse the entire auditorium, whereas others “carefully wiped down surfaces where virus particles might collect” (2021). Again, all of these efforts were made to make movie-goers feel as comfortable and safe as possible, and to ease audiences into the return of the cinema, after a period when a transmissible health virus was claiming lives. It is similar to the measures and protocols that were practised within cinemas over a century beforehand when venues were dealing with Influenza, as at the time cinemas were advised to “spray several times with Jeyes’

Fluid” and told people to avoid others who were coughing (*The Kinematograph Weekly*, 1918b, p. 24). In the century between the pandemics, technology and science have advanced drastically, which therefore meant that cinema owners could tackle the post-Covid reopening with greater knowledge and accuracy. By April 2021, just before the third reopening, experts stated that the risk of transmission from surface particles of the virus was roughly 1 in 10,000, which meant that movie theatres lowered their level of cleaning by the third reopening (Maddaus, 2021). However, the fact that there were three instances of cinema closures followed by three attempts at reopening them, combined with Government response, was another attribute to growing frustrations from cinema owners and audiences throughout the pandemic.

In order for cinema owners to generate revenues post-lockdown, it required a chain of events to occur in the first place. Firstly, audiences had to come to the cinema, which would only happen if they felt safe, and had titles they were interested in seeing, with the latter being dependent on studios deciding to release popular movies in cinemas. This, in turn, was dependent on government guidelines and responses to the virus. In September 2020, Robbie Collin wrote that “hardly any Covid cases [were] linked to cinemas”, suggesting that the ultimate goal for cinemas to draw audiences back in should have been simpler, and yet a change in a decision or other alteration at any stage in the chain of events could prevent it (2020). Around the same time, cases of the virus spiked, as the new academic year began for universities and schools, which further disrupted the movie release cycle and increase audience anxieties. It was the second postponement of *No Time to Die* in October 2020 that was marked as the final straw for Cineworld and its decision to close, and whilst this was frustrating for the owners, it also impacted their staff and workers (Tartaglione, 2020b). James Sillars writes that Cineworld’s closures meant that 45,000 members of staff were forced to lose their jobs, and whilst the first closure due to the pandemic in March 2020 meant that staff could be furloughed and supported by the Government, that scheme was coming to an end, and being replaced by the limited Job Support Scheme, which only supported wages in viable employment with reduced working hours (2020). This not only meant that staff had to likely enter unemployment or Universal Credit but further highlighted the lack of Government decision and support towards the arts throughout the pandemic.

When the second lockdown was announced at the end of October 2020, it was stated that it would last just four weeks and end on December 2nd. It would then move into tier systems, depending on how severe cases were in certain areas. However, this government strategy was also met with apprehension and uncertainty, as the first lockdown announcement only advised a reassessment after three weeks, and eventually lasted a period of four months. The second lockdown was dependent on the number of cases, and as Jessica Elgot writes, the end date could be extended if there were no solutions made to contain the spread of the virus (2020). This lockdown also differed from the first one

for the film industry, as movie productions were allowed to continue if carefully following Covid protocols. On the other hand, for cinema owners, it was another period of frustration, especially after they had invested so much in safety innovations following the first reopening. Tim Robey writes that at the start of October, a £30 million Culture Recovery Fund was dispersed between 42 British independent cinemas, which allowed them to steadily grow and operate throughout the month (2020). However, Robey continues that the forced closure was an “enormous setback for these businesses” as it prohibited them from generating revenues. In addition, an owner of an independent cinema in East Sussex stated that after a promising October of exhibiting a mixture of classic films, documentaries, and National Theatre live streams to “safe and enthusiastic audiences”, the second lockdown leaves them in “the hands of the people without a plan”, highlighting the frustrations aimed at the Government (Robey, 2020). Moreover, Naman Ramachandran writes that although the £30 million fund helped independent cinemas before the closure, there were no funds or support for larger cinema companies, despite huge numbers of staff and valuable contributions to the national industry, as well as local communities (2020).

In addition, coinciding with the second lockdown was a growing rise in the number of anti-maskers, a group of people who refuse to wear masks, despite it being effective in limiting the spread of the virus. Sarah Knapton writes that some of these individuals refuse to wear face coverings as they make them feel uncomfortable and have changed how humans interact with one another, whereas others do it as an act of protest aimed at the Government, for the lack of clarity in their Covid measures (2020). Although the second lockdown did come to an end on December 2nd, the third lockdown was announced just one month later. Stephen Kelly writes that the last few months of 2020 was a “sad and rapid collapse of the UK’s cinema industry”, and despite a limited reopening in December, cinemas had found themselves in a catch-22, as major studios would not release blockbusters, as they didn’t believe audiences were going to the movies, whereas theatres could not bring audiences back, as there was no steady supply of blockbusters to entice them (2020). This further suggests a change to the power balances within the industry at the time, as the financial success of cinemas were dependent on the decisions made by the studios, and cinemas were not the first thought for studios. Whilst *Wonder Woman 1984* was released in December 2020, it was not released to Cineworld, which remained shut with no other blockbusters following it, and it was not shown in London or other cities in Tier 4 restrictions, which prohibited the opening of indoor entertainment venues and non-essential retail. Furthermore, whilst the announcement of the third lockdown was another moment of frustration at a repeated cycle, it was also an opportunity for hope for the film industry and society overall.

By the time of the third lockdown, cinema owners and movie-goers already had two experiences of closures and isolations. Although this meant that they were aware of the possibility

that end dates could be extended, it also meant that theatre owners already had the equipment and measures to reopen safely. But there were other reasons for the third lockdown to be one of optimism. Firstly, on December 8th, 2020, the first vaccine was administered to a patient in the UK, which not only demonstrated an achievement of modern science, but as a result, the stock for Cineworld hit a five-month high (Ritman, 2020b). This suggests confidence in both the British rollout of the vaccine and the cinema chain reopening at the proposed date of May 2021. The vaccine itself also marked a significant point in the advancement of science and technology, as well as the impact it has had on public opinion since Influenza in 1918. As explored in the first section, Influenza was the first intersection between religion and modern science, and the first pandemic to have imposed a vaccination program. Laura Spinney writes that “people balked at the idea that they could be protected against a disease by being injected with it,” but since then, medicine and vaccinations have been used and accepted more commonly throughout society (2017, pp. 25-26). However, just as anti-maskers protested the wearing of face coverings, there were members of society who protested vaccines, as anti-vaxxers, long before Coronavirus’ arrival. Sam Martin writes that throughout the pandemic there were growing cases of anti-lockdown, anti-vaccine, and anti-mask protests, which were all rarely about just one topic, and instead a form of public resistance against Government advice and control (2021, p. 1). Although these protests represented a minority, they nevertheless confirmed the level of public frustration about the pandemic. The third lockdown lasted five months and was the longest of the three, but due to the developments within healthcare, cinemas were able to open in May 2021. In addition, with the consistent levels of film delays from major studios throughout the pandemic, and although some, like *Mulan*, ended up on streaming services, there remained an array of films that awaited a cinema release that audiences had to look forward to. It is evident that throughout the extended period of closures, the need for movie-going was always apparent, but audiences just desired new and exciting films to see, which in turn, required releases from the studios. Although it was not to pre-pandemic levels, people did come to see *Tenet* in 2020, there was just nothing else for them to see after.

In conclusion, although hardly any cases of Coronavirus were linked to cinemas, the virus still resulted in over 200,000 deaths in the United Kingdom and a total of 6.5 million deaths globally in its first two years (Collin, 2020). Furthermore, Covid-19 also brought a standstill to most industries on a worldwide scale, including the film industry, after a century of technological advancement and progression. The multiple closures of cinemas resulted in financial losses for businesses and left thousands in the workforce without jobs and forced onto Government schemes. For films, it was a constant cycle of delayed releases and postponements, and when titles were eventually released, like *Tenet*, they were to considerably lower revenues than pre-pandemic levels. In addition, whilst

productions could eventually continue under strict Covid protocols and measures, the very first lockdown marked a period of filmmakers adapting creatively to a new and unprecedented situation and using the developing technology for innovative storytelling. Moreover, it is evident that when films began to share stories that depicted the virus, despite it being prevalent in the public's surrounding life, they were often seen as tone-deaf or 'too soon.' It further highlights the roles that both movies and cinemas have within society, as one that allows audiences to escape their everyday life, so when the virus was still leading to deaths, it was arguably not the appropriate subject matter for the entertainment intended for escape. When cinemas did reopen throughout the pandemic, theatre owners ensured that it was a safe environment, and yet studios postponing films meant that there was hardly anything on offer for audiences besides "low-budget dramas and a handful of romantic comedies" (Whitton, 2020). Mark Sweney writes that a few months after the third and final reopening in May 2021, a constant supply of films allowed cinemas to bounce back with the highest attendance levels since the pandemic began, which further fuelled hope towards a post-Covid box office recovery (2021).

Ultimately, the postponement of movies was a decision made by studios that had a significant effect on cinema owners. However, the pandemic also marked a time for studios to experiment with other alternative release strategies, including streaming, which had been at the centre of focus before Coronavirus emerged. There were an array of titles that were sent directly to streaming services, including studio-owned platforms, which due to their online and digital nature, were able to remain open throughout multiple lockdowns. Prior to the pandemic, streaming positioned itself as the primary alternative to cinema, but the absence of cinemas meant that streaming was no longer an alternative or an option, but instead, the solution for studios.

The next chapter will explore in greater detail how different types of films were assessed and released by studios throughout the three lockdowns, as well as how the role of streaming impacted movie-going during Covid. When cinemas reopened post-Covid, have they returned to the same role they held within society before the pandemic's arrival? Or have streaming and new release strategies, such as PVoD, changed this for the future and cemented a new power balance between studios and streaming?

Chapter 8:

Streaming and Coronavirus

The emergence of the Coronavirus pandemic saw the introduction of lockdowns which brought global industries to a standstill, including the film industry, as cinemas were closed, productions were forced to shut down and professionals were ordered to stay at home. On the other hand, as this chapter will demonstrate, the digital nature of streaming services meant that the streaming industries could continue throughout the virus. Peter Kafka writes that Netflix saw a surge of new subscribers from people stuck at home around the world, who were waiting out the pandemic by binge-watching movies and television shows (2020). As discussed in Section 1, before Covid, streaming was growing and developing from previous movements, such as home media and cable television, but throughout multiple lockdowns and cinema closures, the rate of growth sped up. In 2020, Netflix gained a record-breaking 37 million additional subscribers compared to its previous record of 28.6 million new subscribers in 2018. (Lee, 2021). The streaming industries also grew beyond subscribers, including the rollout of new subscription services, such as Disney+ in the United Kingdom, HBO Max in the United States, and Apple TV+ globally. There were also the introductions of new methods of release, such as Premium Video-On-Demand (PVoD), which extends on from VoD but allows audiences to pay a higher rental fee for a brand-new release directly to their digital devices and televisions. The role of streaming throughout the pandemic is one that never stopped or slowed down, like the surrounding movie industries, and instead provided an alternative at a time when studios were scrambling to assess the impact of Covid-19 and what to do with their upcoming titles (Kay, 2020b). While studios were adamant about waiting for the reopening of cinemas for certain movies, the stability of streaming became the only viable option for others, especially for smaller and independent titles. This would eventually impact the theatrical window, which although had been a business model that ensured lucrative revenues for cinema owners and studios since the 1980s, it would now be a tool used to balance the precariousness of movie theatres with the growing dominance of multiple streaming platforms.

The pandemic marked the first moment in the history of cinema when movie theatres were closed at a time when audiences had other methods of movie-watching. As Section 1 explored the emergence of streaming and its discourse in the industry before the pandemic, this chapter will examine a period where streaming's growth and presence were almost unrivalled, to assess how it impacted industry relations, challenged the previous traditions and business models in place, and what it means for the future of moviegoing as cinemas would eventually reopen. Studios focussing on

streaming and launching their own platforms is something that predates the pandemic's arrival, but Coronavirus created an opportunity to fully exploit it.

In November 2019, Disney launched their own streaming service, Disney+, in the United States, which featured a catalogue of titles ranging from classic animated films, like *Bambi* (1942, Hand, USA) and *Cinderella* (1950, Jackson et al., USA), to Disney channel television shows, like *Hannah Montana* (2006-2011), to movies from Pixar, *Marvel* and *Star Wars*, all of which are studios or properties that are owned by the company. It would also debut brand new content, including the very first live-action television series from the *Star Wars* universe, *The Mandalorian* (2019-), which released weekly episodes to ensure the platform could build a subscriber base rather than have audiences redeem a one-week trial to binge-watch the entire season (Whitten, 2019b). The plan was always for the service to be released initially in America before a later launch in March 2020 in the United Kingdom and other European territories. Thomas Bacon writes that this was due to pre-existing licensing agreements in the UK, as many of Disney's titles had contracts with Sky that were not due to expire until early 2020 (2019). Although a worldwide launch would have been preferred, Disney could not wait until after the 2019 holiday season for America's launch, as it was an opportunity to gain subscribers. For instance, with people getting together during the holidays, there was a greater chance of watching a movie together at home. With Disney having its content exclusively on its own platform, any possible movie night could be an opportunity to attract new users, especially those searching for a particular title. Disney even launched their platform stateside with exclusive new original releases, including *Lady and the Tramp* (2019, Bean, USA) and *Noelle* (2019, Lawrence, USA), to further entice potential new subscribers. Moreover, *Noelle* was a Christmas-themed movie, and its UK release was delayed by one year, so that it could coincide with the first holiday season since the platform launched locally. Having a title available on only one platform limits the legal ways of watching a film to subscribing, and ultimately means that the studio and service are generating more revenues, which in this case are both Disney. However, in early 2020, the emergence of the Coronavirus pandemic would change the film industry drastically.

On March 23rd, 2020, the day before the scheduled UK launch of Disney+, the British Government announced the first national lockdown, which resulted in the closure of cinemas and enforced strict stay-at-home measures (Rayner, 2020). Whilst Disney, like many companies at the time, had to furlough office employees between March and May 2020, to help on a financial level, streaming was perhaps the only part of the industry that did not have to stop due to the uncertainty that Covid brought (Pulver, 2020). The digital nature of the streaming industry meant that it could continue as other global industries stood still. Whilst movie theatres require the attendance of cinemagoers, streaming relies on home viewing, which could not be better suited for the isolated conditions that

the pandemic brought. Mark Sweney writes that during April 2020, in the middle of the first Covid lockdown, the average person spent 6 hours and 25 minutes each day watching TV. Whilst this does count television as both a form of entertainment and a source to keep informed about the virus, when compared to April 2019, this same statistic accounted for just 90 minutes a day (2020b). Covid brought people to their homes, and as a result, studios used this moment to grow their streaming platforms and generate revenue. Moreover, the launch of Disney+ still went ahead on March 24th in the UK, and Sweney writes that the service gained 22 million subscribers from its British and European launch (2020c). Furthermore, as observed in Section 1, throughout the development of technology and the internet, there has always been an underlying desire to increase the ease and accessibility of day-to-day tasks, from online shopping to banking. Streaming emphasises convenience and has never required a viewer to leave their home, so the launch of a new platform with a fresh new catalogue of titles brought directly to a subscriber's device was a perfect accompaniment to a stay-at-home national order. Although the pandemic was a period of vast uncertainty and fear, of both the virus and when normality would return, the role of streaming at this time was one that was both popular amongst users, and an alternative to the cinema that remained open, which impacted how the industry responded to the virus.

The lockdown announcement and closures of cinemas in March 2020 highlighted a period of panic amongst studios and industry professionals. Jeremy Kay writes that the initial postponement of *No Time to Die's* release date from April to November 2020, not only demonstrated the uncertainty of when normality may resume but also left other studios with titles assessing the virus and how it might affect their releases (2020b). However, there was a particular group of films faced with an even more peculiar and unpredictable situation, those that were just released theatrically before cinemas had shut down. Amongst these titles were the blockbuster *Sonic the Hedgehog* (2020, Fowler, USA), the Irish independent film *Calm with Horses* (2019, Rowland) and several mid-budget dramas, including *Emma* (2020, de Wilde, UK), *The Hunt* (2020, Zobel, USA) and *The Invisible Man* (2020, Whannell, USA). If the pandemic had not occurred, these films would have followed the traditional 16-week theatrical window, as observed in Section 1, as it ensured revenues for movie theatre owners and studios. Following the 16-week period, it would have been released on home media formats, such as DVD and Blu-ray, as well as digital platforms, such as VoD and paid rentals on marketplaces like the Apple Store (formerly iTunes). Studios will then look to sell streaming rights to platforms, such as Netflix or Amazon Prime, or subscription television, like Sky Cinema. This depends on studios' relationships with certain providers, as Disney had a deal with Sky, prior to the launch of Disney+ in the United Kingdom, which used to be the digital home for their titles. Moreover, having various stages of releases across different platforms and markets ultimately allows studios to generate more revenue, even more so for studios

with their own streaming platforms. However, the closure of cinemas disrupted this process, and incidentally provided studios with an opportunity to re-evaluate their release strategies, and in turn, the theatrical window, beginning with the titles released just before the closures.

In mid-March 2020, as cinemas closed down in both the UK and America, Universal, the studio behind *Emma*, *The Hunt* and *The Invisible Man*, announced that these titles would be available at home in the following week, to ensure that “audiences could still watch [these movies] in the current circumstances” (Lowry and Pallotta, 2020). The titles were released as Premium Video-on-Demand (PVoD), at the same digital marketplaces where VoD had been available for years, such as Amazon, Rakuten and the Apple Store. A PVoD release featured a rental fee of £15.99 in the UK, and \$19.99 in the US, which was higher than regular VoD releases, which typically ranged from £4.99 to £9.99, and both types of VoD allowed customers a viewing period of 48 hours (Lowry and Pallotta, 2020). As multiple people could watch the same rental, it did mean that PVoD was an affordable option for shared viewings in a household, as opposed to individual cinema ticket prices. Moreover, PVoD also sustained momentum for the previously disrupted theatrical releases. For instance, according to the BFI box-office reports, *The Invisible Man* placed first in its opening weekend, grossing £2.2 million, it then placed second for the next two weeks, resulting in a total gross of £6.5 million before cinemas shut down (BFI, 2020). Universal’s other film, *The Hunt*, was released on the final weekend before the closures and placed third with a weekend gross of over £500,000. Before the pandemic hit, there was an audience interest in these films, and Universal could have generated additional profits in the subsequent weeks, but with cinemas no longer an option, it put an end to further box office revenues. PVoD became an alternative that not only made financial sense to generate additional revenue, but one that maintained public buzz and interest, allowing audiences to watch titles at home when they no longer had the chance to do so in a movie theatre. Whilst this new market was not adopted by all studios with recent releases at the time, Andrew Wallenstein writes that there were films which were well into their period of theatrical exclusivity when cinemas closed down, including Disney’s *Frozen 2* (2019, Buck and Lee, USA) that benefited from a reduction to the window (2020). Rather than being released through PVoD, Disney released *Frozen 2* earlier than initially expected, and directly onto their own streaming service to generate more subscribers. Wallenstein continues that this, along with other PVoD releases, provided a pivotal moment within the industry, as the virus forced studios to “explore new distribution strategies,” therefore making Covid a “catalyst for long-delayed change.” Streaming’s existence at the sudden emergence of the pandemic was one that has provided hope amid fear, and it continued to have an impact on the decisions made by studios, particularly regarding the films which were scheduled to be released in the months when cinemas were suddenly closed.

As the global lockdowns continued into April 2020, studios essentially had three options for their films which should have been released in cinemas if the pandemic did not occur. Firstly, as explored in Section 1, theatrical revenue has always been the primary and preferred market for studios, as it generates the most lucrative profits, which therefore meant that studios could simply postpone a movie's release date and wait for cinemas to reopen. This was the case for several films, particularly blockbusters, as Rebecca Rubin writes that Sony delayed the release of most of its summer slate, including *Ghostbusters: Afterlife* (2021, Reitman, USA), Disney postponed *Black Widow* (2021, Shortland, USA) and *Mulan* (2020, Caro, USA), and Paramount pushed back *Top Gun: Maverick* (2022, Kosinski, USA) (2020). Rubin continues that these delays meant that studios could use the time to carefully roll out massive global marketing campaigns, to ensure ticket sales and in turn, a profit. However, the delays also bring forward the ideas of uncertainty and unpredictability. There was no guarantee when cinemas might return to normality, as well as how eager audiences would be to return to them following a global health crisis.

The second viable option stemmed from the fact that before the pandemic, streaming had, as discussed in section one, already positioned itself as the primary alternative to the cinema with its emphasis on convenience, approaches to producing original films, and interacting with audiences. As the streaming industry did not come to a standstill during lockdown, studios could sell the rights of an upcoming film to a streaming service, which could distribute the title to millions of established subscribers worldwide. This was the case for *Enola Holmes* (2020, Bradbeer, USA), which Netflix acquired and released directly on their platform in September 2020, amongst many others (Kit, 2020). What is evident between both of these options is that it was typically the blockbusters which were delayed for cinemas, where they could maximise their revenue. On the other hand, smaller films were sold to generate short-term revenues amid an unpredictable theatrical climate, whilst ensuring that the title still had an audience in a platform's subscribers.

The decisions made by studios are ultimately financially driven, and given the circumstances of the pandemic, both options are risks. However, the third option, the newly introduced PVoD, was arguably the biggest risk of them all. One of the first films to have its debut release via PVoD was *Trolls: World Tour* (2020, Dohm, USA), which was initially scheduled to be released in UK Cinemas in April 2020. The film's distributor, Universal, had already released *The Invisible Man* and *The Hunt* via PVoD, and the decision to debut *Trolls: World Tour* allowed the studio to experiment further with this release method and a new title, especially as it did not have its own streaming platform. Moreover, the strategy meant that it could benefit from the marketing campaign that began before lockdown, avoid the risk of the uncertainty of cinema's return, and at the same time, allow families stuck indoors to rent the film for £15.99, which is cheaper than the average family trip to the cinema. It was slightly more

complicated in America, as the film was released theatrically alongside PVoD in some states where cinemas remained open (Rubin, 2020b). Not only does this mark a significant break from the 90-day US theatrical window but highlights the shifting attitudes towards simultaneous releases, too. This ultimately impacted the relations between theatre owners and studios and will be examined later on in this chapter. Moreover, Tom Brueggemann notes that PVoD would also bring incomplete data to the box office, similar to the way that streaming reports its data and metrics, as for the case of *Trolls: World Tour*, its financial success is solely based on estimates (2020). Brueggemann continues that *Trolls: World Tour* grossed an estimated \$50 million in its first week in America, the largest revenue of any digital title at the time. By comparison, its predecessor, *Trolls* (2016, Mitchell, USA) grossed \$46.5 million at the box office in its US opening weekend, with a worldwide total of \$346.8 million (D'Alessandro, 2016). *Trolls: World Tour* had a lower budget than *Trolls*, and its projections for the box office prior to the pandemic could be assumed to be similar to the final gross of *Trolls*. However, the only box office statistic that was released was its estimated first week digital total of \$50 million, and although this does not accurately account for how much the movie generated, it does demonstrate that PVoD was a promising alternative amid the pandemic.

Throughout each of the three options that studios were faced with is the emergence of a new norm, one where “studios have the upper hand” in the distribution industry (Bruggemann, 2020). This chapter, and the rest of this section, will demonstrate the ways in which the virus changed the dynamic within the film industry.

Lucas Shaw writes that the pandemic created an opportunity for Hollywood to sharpen its attention and focus on what it believes consumers want (2021). As the streaming industries continued despite lockdowns and the closures of cinemas, it allowed studios to use this moment to make streaming their priority, as it was “fast becoming the only way that most people got their film and TV” (Shaw, 2021). Where Disney had already launched their own streaming service with Disney+, other studios soon followed, as Warner Bros. launched HBO Max in May 2020 and Paramount debuted Paramount+ in March 2021. Apple also launched Apple TV+ in November 2019, where it offered original film and television programming, which it began to produce specifically for the platform. However, in May 2020, Apple TV+ suffered from low subscriber growths, while the rate of other platforms was accelerating amid the pandemic, which forced them to switch strategy and start licensing other content to expand its programming library and compete with other platforms (Katz, 2020). In addition, MGM also had their own streaming service, titled Epix, which could be accessed as an Amazon channel in the UK, for an add-on subscription fee. In May 2021, Amazon announced its intent to fully acquire MGM, with the merger completed in March 2022, where MGM would rebrand as MGM+, a sister platform streaming adjacent to Amazon Prime (Maas, 2022).

Multiple studios having their own streaming services has several implications. Firstly, an entire catalogue of titles including their respective intellectual properties and franchises are all housed under one roof, and secondly, subscribers become a new source of revenue, which in itself is more reliable for studio projections than individual ticket sales varying from movie to movie. In the first quarter of 2020, Netflix added sixteen million new subscribers, shattering its previous records and own estimates, which demonstrates the accelerated growth of streaming due to home confinements (Spangler, 2020b). But for other studios rolling out their platforms, it meant that they were beginning to share in this accelerated moment of home viewing. Moreover, whilst studios had three options to ponder for their upcoming titles during lockdown, there was now a fourth option being created for those with their own platforms. Rather than wait for the reopening of movie theatres, sell to another streamer, or gamble on the advent of PVoD, studios could now subsidise their titles to their platform. An early example of this was Disney's *Artemis Fowl* (2020, Branagh, USA), which, prior to the pandemic, was scheduled to be released theatrically in May 2020. In April 2020, amid the absence of the movie theatre, Disney announced that the film would be released directly to their streaming service, and free for all subscribers (Petski, 2020). If *Artemis Fowl* did get a theatrical release, it would have generated box office revenue, but as the film is not a direct sequel or instalment to an existing franchise, it would have been difficult for the studio to estimate figures, which means it could have flopped, and therefore been a financial risk. Whilst the movie received negative reviews upon its release on the streamer for its "lack of coherency and good special effects," a streaming release did not mean there was a focus or desire to generate ticket sales, but instead simply appeal to subscribers (Erbland, 2020). A new cinema release straight to streaming is both a reason for new audiences to subscribe to a platform and a reason for existing ones to maintain their subscription. At a time when the closure of cinemas also meant the absence of the preferred revenue, the pandemic allowed studios to trial and learn streaming, and, at the same time, created a period of experimentation with new release strategies. As each of the three to four options studios faced had its own risks and benefits, there was truly no safe, predictable, or projectable option, and how studios trialled new strategies and release models became more abundant as the lockdown continued.

Just as in any early stage of technological development, from digital to special effects, there has been a period of experimentation, trialling, and learning. And whilst Netflix, and other online streamers like Amazon Prime, Hulu and MUBI, had existed for over a decade before the pandemic, the first lockdown marked a period for major Hollywood studios to join in and truly experiment with streaming. Anthony Breznican writes that this time was filled with uncertainty and "making a mistake could have devastating consequences" (2020). Studios continued to release more original content and programming directly to their platform, including Apple TV+'s *Greyhound* (2020, Schneider, USA)

starring Tom Hanks, but as cinemas began to reopen in July 2020, it created an opportunity to trial even more strategies. As discussed in the previous chapter, the reopening of movie theatres and delayed release dates marked a period of uncertainty for owners and studios, as they were desperate for audiences to return but unsure of their willingness. Cinema owners wanted blockbusters to attract and entice these returning movie-goers, and the first major film released post-lockdown was *Tenet* in August 2020. In a way, *Tenet's* release was an experiment between a studio and theatrical distribution in a pandemic, which aimed to test the level of attendance and success for a movie amid the reopenings. Guy Lodge writes that *Tenet* set the precedent for the box office of a Covid blockbuster, which on one hand provided vital insight and statistics into the new circumstances, but on the other hand, was “borderline disastrous for the studio” as it grossed £235 million globally in its first six weeks from a production budget of £154 million when other Nolan titles grossed considerably higher (2020). Initially, Disney were waiting for *Tenet's* data to estimate how the theatrical release of its title *Mulan* would be two weeks later, but just two weeks before *Tenet's* release, Disney had decided to avoid the risk, skip the cinema, and experiment with a completely new strategy. Adam B. Vary writes that Disney was planning on combining both a PVoD and an offloaded release directly to its platform, by releasing *Mulan* as a premium rental, where pre-existing subscribers have the option to pay a £19.99 in the UK or \$29.99 in the US fee to be able to unlock the title in Disney+'s digital catalogue, before being made available to all subscribers inclusive at a later date (2020). Whilst this strategy offered subscribers a brand new movie without having to leave their homes in a pandemic and did not risk unpredictable ticket sales, it also brought several other economic benefits. As Vary continues, Disney's model meant that the studio did not have to split the rental fee with digital marketplaces, as other PVoD releases like *Trolls: World Tour* did. In addition, it was another appealing factor in the goal of generating new and maintaining existing subscribers, which ultimately provided another revenue for the studio.

However, throughout all of these new release strategies implemented between March and August 2020 was an underlying effort to shorten the theatrical window. But just as the theatrical window was established to generate lucrative revenues for both cinema owners and movie studios, by balancing both the cannibalisation and marketing effects of a window's duration, as examined in Section 1, the shortening of the window was impacting the attitudes of cinemas and disrupting the relationship between owners and studios.

When Universal trialled PVoD for the release of *Trolls: World Tour* in April 2020, cinema owners were displeased with the growing effort from studios for simultaneous releases and shorter periods of theatrical exclusivity. As a direct response to *Trolls: World Tour*, whilst their theatres were still shut due to the virus, both Cineworld and AMC (the owner of Odeon) refused to play future Universal films, due to a “completely inappropriate decision” that disrespected decades of “business practise, partnership

and transparency” (McNary, 2020). The theatrical window always set the goal of protecting theatrical revenues and prioritising the box office but as observed in Section 1, prior to the pandemic, there were calls for a reduction in the window, which had been 16 weeks in the UK and 90 days in the US. Brueggemann notes that cinema closures in the pandemic had affected both studios and theatre owners financially, but where studios could migrate their losses and experiment with new release strategies, this was not the case for the other party, who had no protection nor backup plan (2020b). Between April and the reopenings in July 2020, all cinema owners had was the time to come to an agreement with studios or develop an alternative strategy. Studios evidently had the upper hand at this time, and in July, AMC and Universal reached an agreement of just a 17-day theatrical window to PVoD, exclusively as an experiment in the United States (D’Alessandro, 2020). This major reduction to the window meant that the studio could promote a theatrical release and share a marketing campaign before releasing it as a premium rental, which remained an experimental method in itself. It also meant that audiences, who were still dealing with the pandemic, had two viable options to think over, that catered for their willingness to return and mix with others after months of isolation, without having to wait an extended period for a viewing in the safety of their homes. However, as Anthony D’Alessandro continues, Cineworld CEO Mooky Greidinger discouraged the deal, stating that there was “no business sense in the model” and that Universal’s next major film was still several months away, with the chance of it being pushed back further, meaning that it was no immediate worry (2020). Cineworld has always been adamant about respecting the theatrical window before the pandemic, to protect revenues and the very practice of movie-going, and Greidinger remained certain that the company would not change its policies. However, the situation between movie theatres and owners would continue to develop as the pandemic progressed and spanned three lockdowns. Although the deals Cineworld made in May 2021, just before the third reopening of cinemas, will be explored in greater detail later on in this chapter, Disney’s September 2020 decision to release *Mulan* directly to Disney+, served as both a pivotal reminder that in the post-Covid industry, studios had the upper hand and further highlighted the growing dominance of streaming and digital viewing.

As discussed in the previous chapter, cinema owners were dealing with a catch-22 during the summer of 2020. One on hand, they required studios to release popular films and blockbusters to draw audiences in, but on the other, studios required stability in exhibition, movie-going, and the box office, to feel confident enough to release a title. Whilst *Tenet* underperformed when compared to pre-pandemic levels, the streaming industries were continuing to grow and therefore highlighting its stability amid the virus. Between April and June 2020, Netflix gained an additional ten million subscribers, with a spokesperson for the company attributing it to “people turning to entertainment” when socially restricted (Spangler, 2020c). Moreover, the Oscars and BAFTAs announced that they will

allow movies which were not released theatrically to be eligible for award nominations for the 2021 ceremonies, further legitimising the streaming industries (Wheeler, 2020). This is significant as prior to the pandemic, the 2019 and 2020 award campaigns and seasons were centred around the discourse between cinemas and streaming, for nominated films like *Roma* (2018, Cuaron, Mexico) and *The Irishman* (2019, Scorsese, USA), and whether or not they deserved to be eligible. It is important to remember that regardless of Coronavirus, studios were set on launching their own streaming platforms. But if the pandemic had not happened, they might have been viewed as studios joining in on a trend or an attempt at moneymaking gimmickry, just as their efforts to convert films to 3D were met with a decade earlier. Lockdowns meant that cinemas were closed, which meant their attempts with streaming were an opportunity to experiment with release models, without factoring in the primary revenue of the box office. In addition, simultaneous releases had existed with independent films from Curzon in the UK, but the pandemic meant that major studios were trialling it with large blockbusters, bringing more attention to the accessibility of films. When Disney released *Mulan* straight to their service in September 2020, Alex Ritman writes that it was initially met with bewilderment from UK exhibitors (2020). *Mulan* skipped cinemas completely when it could have “provided a boost for audiences and cinemas waiting for new films after *Tenet*,” and even a simultaneous release could have given audiences the option to choose how to watch it (Ritman, 2020). This further demonstrates the power that studios had during this time of frustration for theatre owners, yet Christopher Palmeri writes that Disney were pleased with *Mulan*’s performance, which generated \$30 million in premium rentals and brought many new subscribers to the platform (2020). With the pandemic making theatrical releases uncertain and unpredictable, it is unknown how the film might have performed with a period of cinema exclusivity, or even with a simultaneous release. Both *Tenet* and *Mulan* had production budgets of around \$200 million, but whilst *Tenet*’s box office was viewed as an underperformance, the revenue generated from *Mulan*’s rentals was regarded as a success, despite being lower. This further demonstrates the risks that went into a film’s release during the pandemic regardless of the method, but at the same time, suggests that subscribers are becoming more lucrative or sought after than ticket sales, as subscriptions can be projected and tracked to greater accuracy. Nevertheless, while *Tenet* was the only major film to be released with theatrical exclusivity during the summer of 2020, its reception and revenue continued to impact studios in the months that followed.

In December 2020, as the UK was in its second lockdown and the theatrical climate remained unstable globally, Warner Bros. announced plans to release its entire 2021 slate in cinemas and on its streaming service, HBO Max, simultaneously (Barnes, 2020). Brooks Barnes notes that the decision ultimately posed the biggest challenge to Hollywood’s traditions of release models since the pandemic

started and became a significant talking point amongst industry professionals. The 2021 Warner Bros. slate featured dramas, such as Clint Eastwood's *Cry Macho* (2021, USA), as well as blockbusters like *Dune* (2021, Villeneuve, USA) and *Godzilla vs. Kong*. However, HBO Max was a service exclusive to the United States, and having films available on streaming services meant that the same titles could be pirated online at the highest possible quality. This could incidentally impact global audiences and their willingness to see Warner Bros. films in cinemas, knowing it was also available digitally online, albeit illegally. Furthermore, having UK cinemas closed under the third lockdown for the first five months of 2021, meant that early 2021 Warner Bros. releases, which included *Godzilla vs. Kong* in March, would not even see a theatrical release at the same time. This meant that UK audiences could either pirate a title, wait for a PVoD release or wait for cinemas to reopen. However, UK exhibitors, like Cineworld remained adamant on respecting the theatrical window at the time, meaning that Warner Bros. were forced to make deals with exhibitors, so that they could decide how to approach releases in international markets with closed cinemas. Although discussed in detail later on, Cineworld did come to an arrangement with studios regarding exclusivity in May 2021 just as their venues were set to reopen. For *Godzilla vs. Kong*, the only suitable option was a PVoD release, which occurred a month after a simultaneous release in America and a month before UK cinemas reopened, which allowed the studio to combat piracy and generate revenue.

However, Warner Bros. were severely criticised by industry professionals for their decision towards simultaneous releases, and in particular, from the filmmakers whose titles it involved. Christopher Nolan, who directed *Tenet* for Warner Bros., and whose release might have discouraged theatrical exclusivity for upcoming titles, stated that the directors of the 2021 slate "went to bed thinking they were working for the greatest movie studio, and woke up to find out they were working for the worst streaming service" (Masters, 2020). This suggests that not only were the directors unaware of the decision in advance but highlights a disregard from the studio for the movie-going practice, which ultimately perceives itself as an effort to solely make money and grow subscribers. Kim Masters continues that the decision was supposedly made by the company's Chief Operating Officer, Carolyn Blackwood, who viewed the 2021 slate as weak, and an opportunity to "avoid humiliation and bad grosses". Furthermore, the entire Warner and HBO Max situation reiterated a conflict of ideas that had been present within the industry before the pandemic, which is making films to share stories or to generate profits, one an art form and the other, an economic business. When Netflix was criticised for their pre-Covid original films and how its release model disrupted the theatrical market, the filmmakers working with the company always reiterated the freedom and the opportunity to make a film that no other studio would greenlight in the first place, such as Alfonso Cuarón's black-and-white Spanish language film, *Roma*. However, with major studios like Warner Bros. now heavily involved in

the streaming market, it shifted the primary focus back to the profits, which could be an attribute towards Nolan's title for "worst streaming service" (Masters, 2020). Nolan had collaborated with Warner Bros. for nearly twenty years, but its decision clearly showed disrespect to the director, as many theatre owners had personally felt with certain strategies that disregarded exclusivity, and subsequently, Nolan went to Universal to make his next film, *Oppenheimer* (2023, USA), which, alongside Sony, are the only major Hollywood studios without their own designated streaming platform (Williams, 2022b). In addition, the focus on revenue would continue to be a leading factor in the decisions made by other studios concerning streaming and alternative release strategies, as cinemas would start to reopen globally in May 2021.

The third lockdown in the United Kingdom lasted five months between January and May 2021, and whilst the previous two brought frustration and uncertainty to both industry professionals and the general public, the third came with some hope for the return of normality. Whilst vaccines began to roll out throughout this time, alternative release strategies also continued. It is important to note that throughout this time streamers like Netflix and Amazon Prime continued with their original titles, with the former releasing two Best Picture nominees at the 2021 Academy Awards with *Mank* (2020, Fincher, USA) and *The Trial of the Chicago 7* (2020, Sorkin, USA). Although a streaming title did not win Best Picture, it does demonstrate a growing acceptance of these movies among industry professionals, as traditional releases were virtually impossible for all of the other nominees. For instance, the Best Picture winner, *Nomadland* (2020, Zhao, USA) had its premiere at hybrid international film festivals, including the London Film Festival, where it had limited in-person screenings that followed the same strict Covid measures that cinemas operated with during the reopenings. In addition, the festival was also digital, with online screeners of certain titles available across the country, which not only made the festival accessible for those outside of London but meant that audiences could watch from the safety of their own homes (Dalton, 2020c). Online screeners had also been a vital method for studios to give press copies of its movies for reviews, which Simon Brew writes made film journalism more accessible and opportunities fairer for those who did not live in London or other major cities, which further highlights the importance of digital availability (2021). By the time of *Nomadland's* general release, it was only able to receive a theatrical one in select territories, which included America, but not the UK. In the USA, it had a simultaneous release with cinemas and the streaming service Hulu in February 2021, but in the UK, it was only released at the end of April 2021 and directly on Disney+, after it already won the Oscar. This decision might have been economically driven, as an attempt to generate subscribers to the platform, who were seeking to watch the most recent Best Picture winner. However, three weeks after releasing on Disney+, cinemas reopened in the UK, and with it, *Nomadland* was exhibited in 430 movie theatres in the country. In its first weekend at the box office, it placed

second and grossed approximately £875,000, and in the following week, it placed 6th with a gross of around £182,000 (BFI, 2021). The fact that a film which was already available on a streaming platform placed second in the week of cinema's return does suggest audiences were waiting for cinema's return to see an acclaimed Oscar winner. While *Peter Rabbit 2* did place first in cinema's opening weekend, other titles that debuted exclusively in cinemas, including *Spiral* (2021, Bousman, USA), *The Unholy* (2021, Spiliotopoulos, USA) and *Those Who Wish Me Dead* (2021, Sheridan, USA) placed 4th, 5th, and 7th, respectively, with grosses ranging from £779,000 to £302,000. Although *Spiral* belongs to the *Saw* franchise, the previous instalment *Jigsaw* (2017, The Spierig Brothers, USA) grossed £1.5 million in its opening weekend, suggesting that *Spiral* underperformed to franchise predictions. Each of the three titles are mid-budget films, and given the circumstances and unpredictability of the pandemic, perhaps these movies would have been more successful with a streaming release or alternative strategy.

Studios moving their releases directly to their digital platform, or selling it to a pre-existing one, continued to be the case for several mid-budget films, including *The Secret Garden* (2020, Munden, UK) and *Promising Young Woman* (2020, Fennell, UK), which were sold to Sky and released on Sky Cinema, a television channel and digital catalogue of titles rebranded from Sky Movies, and Now, a streaming service owned by Sky. However, as observed with *Nomadland* and *Godzilla vs. Kong*, which Warner Bros. released as PVoD, it tended to be the big studios who treated their larger blockbusters or acclaimed titles as a hopeful opportunity to focus on streaming's presence and gain subscribers. On Christmas Day 2020, Disney released Pixar's *Soul* (2020, Doctor, USA) directly onto their platform at no added cost to subscribers, but just two months later, released *Raya and the Last Dragon* (2021, Estrada and Hall, USA) from Walt Disney Animation studios onto the platform under a premium rental similar to *Mulan* (Fuster, 2020). However, this change in release approach for the two movies was met with frustration from Pixar staff, who viewed the lack of premium rental for *Soul* as disrespectful to the filmmaking process and technical craft of animation. Zack Sharf notes that Pixar staff deemed *Soul* as the end product of thousands of animators, but the studio ultimately viewed it as an economic asset, a title on a streaming service, and something less than a more profitable film (2021b). Whilst the studios focussed on their efforts to generate profits and subscribers and created the opportunity to experiment with both release strategies and streaming, it also further demonstrated how at this moment one year into the pandemic, studios had the significant upper hand in the movie business, and it was continuing to impact their relationship with both filmmakers and exhibitors.

In February 2021, *Raya and the Dragon* received a simultaneous release with cinemas in territories where they were open alongside its premium rental premiere on Disney+. However, by the time UK theatres reopened in May 2021, cinemas were already opened in a lot more countries globally,

and yet, simultaneous releases were still a viable option for Disney, who could benefit from box office revenues, subscriptions, and rental fees. The issue for Disney was now with UK exhibitors like Cineworld, who throughout the pandemic, were adamant about only releasing films that respected the theatrical exclusivity window, and therefore their profits (D'Alessandro, 2020). However, the difference now was in the very status quo of film distribution, as theatres needed large films to draw audiences back in. If a studio like Disney, which release *Marvel* and *Star Wars* titles, which have large box office potential and appeal, are able to impose flexible and experimental release strategies that break the traditional theatrical window, then it would be financially disastrous for a cinema to boycott those movies. Nancy Tartaglione writes that in early May 2021, just two weeks before UK cinemas were set to reopen, Cineworld had reached an agreement with Universal, Warner Bros. and Disney (2021). This was a significant moment within the UK film industry, as Cineworld was the most vocal chain surrounding theatrical exclusivity, and the last major chain to attempt a negotiation. By comparison, as observed earlier, Odeon's parent company, AMC, had reached a deal for a shortened window in July 2020. Regarding Cineworld's deal, Tartaglione continues that it saw different arrangements for UK and US exhibitors, as well as for different types of films. For instance, in the UK, there would be a 31-day theatrical window before a movie's PVoD release, but an extended 45-day window for films that open above a certain figure at the box office, which would apply to more profitable releases. In America, it was a similar situation, but with an even shorter window of just 17 days, and a longer 31-day period for films that gross over \$50 million in their opening weekend. This agreement marks a historic turning point within the theatrical distribution industries, as it is the first major shortening of the window in the UK since 2006 when it was shortened to 16 weeks (Bakhshi, 2007). The difference in the window is also fundamental, as a longer window favours the cannibalisation factors that Hasan Bakhshi discussed and protects the favoured theatrical revenue. At the same time, a shorter window for lower-performing titles allows a movie to generate a theatrical revenue, and then benefit from the recent marketing campaign and word-of-mouth to have a second chance of generating profits via PVoD. Moreover, the role of PVoD is also significant to the streaming industry, as it becomes the stepping-stone between a theatrical release and a regular streaming or home video release. This suggests that it is the second preference for revenue and profits, which further highlights the growing value and importance of digital availability and streaming within the industry.

As Cineworld only reached an agreement with Disney in May 2021, it meant that the studio's plans from March were still in operation for the release of *Cruella* (2021, Gillespie, USA), which opened in UK cinemas one week after their reopening. However, *Cruella* also received a premium rental on the same day on Disney+ in the UK, but again, Cineworld, and other chains, were in no position to contest

this, as returning audiences were eager for new titles. This was also the case for *Black Widow*. The film had a simultaneous release as a premium rental on Disney+ and a theatrical one in cinemas, including Cineworld, which highlights a new wave of flexibility that resulted from the pandemic. Sam Moore notes that although the simultaneous release was financially essential for exhibitors at the time, it was still a moment that sparked anger and frustration (2021). Moore continues that theatrical exclusivity meant that “all stakeholders in every cycle of the movie’s life” are given a fair opportunity to generate a revenue, and simultaneous releases meant that studios like Disney were getting larger percentages, not only from subscribers and rental fees but from audiences who might have been steered away from the cinema, too. *Black Widow* underperformed at the box office when compared to previous titles in the *Marvel Cinematic Universe*, and Moore notes that piracy has been an emerging factor from simultaneous release strategies, as “pristine digital copies are available in minutes of release on Disney+” (2021). On the week of *Black Widow’s* release on the streamer and in cinemas, it was also the most torrented movie from online websites and downloads, which negatively impacted the filmmakers, including lead actor and producer, Scarlett Johansson. At the end of July 2021, a few weeks after *Black Widow’s* release, Johansson sued Disney for their decision, stating a “breach of contract that guaranteed an exclusive theatrical release”, as her salary was based in part on the box office takings (Flint, 2021). A Disney spokesperson responded that Johansson’s decision to sue was “disregarding the horrific pandemic” and at the same time, the premium rental gave her an additional opportunity to generate compensation from the movie’s release (Flint, 2021). Whilst the lawsuit was settled in October 2021 with a “mutual and undisclosed agreement”, it does further illustrate how streaming impacted the film exhibition and distribution industries (Pulver, 2021).

It is important to remember that a lot of the movies discussed in this chapter that had their releases affected by the virus, were a wave of titles produced before the pandemic and without it in mind, as opposed to a new wave of movies produced during the pandemic. Coronavirus was unexpected, unpreparable, and damaging for several industries, and although it caused panic, fear, and frustration, it also created an opportunity for studios to experiment with flexible and modern release strategies. It further legitimised streaming, and for many mid-budget titles, became perhaps the only financially suitable place for audiences to watch them at a time of uncertainty. Moreover, following *Black Widow*, Disney had just one more film lined up for a premium rental and simultaneous release with *Jungle Cruise* (2021, Collet-Serra, USA), but its new deal and arrangements with exhibitors, like Cineworld, provided a new alternative strategy and, as a result, no other Disney titles had a premium rental afterwards. In addition, during the May 2021 reopening, UK theatres that had been adamant about respecting the theatrical window throughout the pandemic reopened their venues with titles like *Godzilla vs. Kong* and *Nomadland*, which already had digital debuts, amongst new

movies premiering for the first time. Whilst the titles sold to Sky, like *Promising Young Woman*, were never shown in these cinemas, it demonstrates how Covid brought flexibility to these industries, with the opportunity to alter rules between studios to maximise profits and generate revenues. Ultimately, the pandemic was something that could never have been truly predicted, and while there have been calls for a shorter period of theatrical exclusivity for years before its arrival, Coronavirus was the catalyst that significantly reduced it in just over a year and provided a vital new opportunity for alternative release strategies for a variety of movies.

In conclusion, prior to the pandemic, advancing digital technology allowed cinemas to entice audiences with viewing formats that emphasised the spectacle, and at the same time combat the appeal of additional home media markets. The growing popularity of streaming in the 2010s appealed to filmmakers, studios, and audiences, and created new release strategies that challenged the theatrical window in place. These factors ultimately shifted audience behaviours and viewing habits and streaming gave audiences the freedom and control to watch movies in their home and at their convenience, thus cementing it as the primary alternative to cinema. But with movie theatres closed due to the pandemic for the first time in the industry's history, it meant that suddenly, streaming had no competition, and audiences had virtually no other way to watch a new movie. This moment allowed studios to exploit, experiment and trial new, modern, and flexible release strategies, whether on their own platforms, like Disney+, which provided a viable new income in subscribers, or through new business models like PVoD. Every option that studios faced had its own risks and benefits, and coinciding with this, streaming services were growing more popular with audiences who were signing up during home confinements. During the pandemic, which saw three reopenings of cinemas in the United Kingdom, audiences had more choices as to how they could consume their movies, from the willingness to return to the cinema, the ability to get new cinema releases on their personal devices, and the shortened window meant that it would be sooner than ever before. Streaming and the pandemic are both factors that significantly impacted the relations between studios and exhibitors. Whilst studios focussed on finances, the latter saw the former's decisions as a disregard for exclusivity and traditional practices.

A shortening of the window has been a talking point at the centre of the long-standing discourse between cinema and streaming existent before Coronavirus' arrival. But now that new deals and arrangements between cinema owners and studios have taken place amid the pandemic, what does it mean for the future of movie-going? The pre-pandemic window was 16 weeks or 90 days in the UK and US, respectively, but as of the third reopening of theatres in May 2021, now stands at 31-45 days for the United Kingdom and between just 17 and 31 days in America. The reduction is significant and allows underperforming titles, in a crowded theatrical climate, to benefit from

established marketing campaigns with sooner releases as premium rentals. On the other hand, more profitable movies have more time to cannibalise a larger window of theatrical exclusivity and generate more revenues.

As much as the pandemic has been a catalyst for change, it has also been uncertain, and it remains uncertain whether or not this new shorter window might in fact be too short. As streaming continues to focus on the convenience, but now has an influx of titles from various studios, services, and release methods, does the spectacle of the movie-going experience hold enough of its own merit to maintain and entice audiences or would they simply wait for the shorter window at home? As cinemas reopened in May 2021, the viewing habits of audiences became the focal point of the post-Covid industry and the return to a new normality. With studios focussed on streaming and alternative release strategies as much as theatrical releases and the preferred box office revenue, the next chapter revisits the debate surrounding cinema and streaming, which was existent before the pandemic, and now more apparent than ever before.

Chapter 9:

Cinema Vs Streaming: Part II

On one hand, the Coronavirus pandemic and global lockdowns brought the film industry to a standstill, as cinemas and productions were forced to shut down, which left upcoming movie titles in precarious situations. On the other hand, the uncertain circumstances also provided an opportunity for accelerated growth and development in streaming and its subscribers, as studios trialed and experimented with new platforms and release models, which impacted the traditional theatrical window that had existed for decades before the virus' arrival. Peter Bradshaw writes that when cinemas reopened for the third and final time in May 2021, exhibitors, studios, and audiences were wondering if this would be the "return to the old normal", or instead to a "new normal that the business has not grasped yet" (2021). It was at this precise moment within Covid's timeline when the debate and discourse surrounding cinema and streaming revived itself from the pre-pandemic industry and re-emerged in a new and different playing field. As cinemas returned from a period of absence at a time when streaming continued to grow, the questions that faced the industry were where should audiences watch their films, and why? Moreover, as *No Time to Die*, the first title to be delayed as a result of the pandemic, was eventually released in cinemas in September 2021, does it further suggest that blockbusters and highly profitable franchise films are best suited for the theatrical climate, with smaller, mid-budget titles set for streaming services? As audiences decide what release model and platform work for them, the use of advertising during this time, particularly from exhibitors, will be investigated to see how the industry attempted to attract viewership. In addition, has the increase in the amount of original film and programming available on streaming services, combined with the shorter period of theatrical exclusivity, further impacted audience's perceptions and behaviours towards movie-going? Whilst television is another significant evolving factor impacting the contemporary movie industry, its discussion and analysis fall outside the scope of this thesis, and whilst it is important to acknowledge television's presence, this chapter will continue to focus on film.

Cinema and streaming were two significant models just before the virus arrived, and their significance remained more prevalent than ever as the industry reopened following the pandemic and attempted to find the balance between traditional practices and new innovations and developments. Just as the first section of this thesis ended with a chapter that examined the cinema and streaming debate, with an overview of important factors surrounding it, such as digital cinema, the theatrical window and home media, the final chapter of this section revisits the same debate, now in light of a new, emerging factor that is Coronavirus.

As discussed in Section 1, there have been times in history when cinemas were closed en masse, such as the 1918 Influenza and World Wars, and there have also been threats to the primacy of the movie theatre, which began in the 1950s with television and have grown significantly with the advent of home video in the 1970s, then DVD in the 1990s and finally the advent of streaming in the late 2000s. But the Coronavirus pandemic marked the first time in history when there was a rival to the theatrical experience and theatres were unable to respond. As a result of the pandemic, audiences could reassess how they value the traditional practices associated with the cinema, as well as home viewings, which have seen years of technological advancement and heightened accessibility and availability, without directly contrasting the two models with one another. Studios also utilised this time to experiment and exploit with streaming services, particularly studios with their own platforms, in an attempt to generate more subscribers and boost revenues. In May 2021, cinemas reopened for the third and final time, but to a society that has lost so much to the virus, from loved ones to livelihoods to leisure. Audiences were not only returning to the cinema in light of the pandemic but in light of the developments within the exhibition and streaming industries too. The discourse between cinema and streaming was revived in new circumstances and left the film industry heading towards a sense of uncertain normality.

Following the May 2021 reopenings, the theatrical exhibition markets looked promising, despite the presence of simultaneous releases as a strategy from the major studios. Tom Brueggemann notes that the releases of *Cruella* and *Black Widow*, which premiered in cinemas and on Disney+, as well as *The Conjuring: The Devil Made Me Do It* (2021, Chaves, USA), which had a simultaneous release with HBO Max in America, received around 40-45% of the gross of films in the same period in 2019 (2021). At this moment in 2021, cinemas entered a new playing field where audiences were still feeling the effects and caution of the virus, and where most of the titles being exhibited theatrically were also available parallel at home. Brueggemann continues that although the gross was not as much as before the pandemic, “exhibitors can expect the figures to improve” as audiences re-adjust themselves to a new climate, which further proves that same-day home availability is not the end of the world for cinemas (2021). As the weeks progressed, the idea of a return to normality for cinemas looked more likely, as newly released blockbusters continued to raise the bar for the post-Covid box office. In June, *F9* (Lin, 2021, USA) opened in the UK and US, where it received a \$70 million debut in the latter. This was a few weeks after the film premiered in South Korea and other territories where cinemas had been open for longer, meaning by the time of its UK/US release, it had a global total of \$405 million, which was the highest for any movie since the pandemic first started (McClintock, 2021). The rise in box office figures for films can be attributed to audiences becoming more comfortable with movie-going, as well as the safety measures put in place throughout cinemas. Hannah Devlin writes that during the summer

of 2021, around one in ninety people in the UK had a Covid infection, which means that a screen with an audience of up to 300 people, could have 3 to 4 people with the virus, who risk passing it on to others (2021). This meant that cinema-going was not completely risk-free, and a report by the UK Cinema Association found that only 17% of audiences aged 55-and-over expressed interest in returning to the cinema when reopened, compared to 44% of 18–24-year-olds who plan to visit a cinema as soon as they reopen (UKCA, 2021). However, the continued use of safety measures implemented from the first reopenings in 2020, including ventilation systems, the encouragement of mask-wearing and sanitising, as well as the on-screen adverts, further highlighted the measures that venues took to help ease audiences and make movie-going feel safe.

With a constant supply of new releases following the third reopening, which was not apparent after the first and second attempts in 2020, audiences had a greater variety of titles to continue visiting theatres beyond the initial reopening. This is evident in the September release of *Shang-Chi* (2021, Cretton, USA), which succeeded *Black Widow* in the *Marvel Cinematic Universe* and had the second-highest post-Covid opening weekend in the US (Couch, 2021). Although *Shang-Chi* did not receive a simultaneous release, which *Black Widow* did at the start of summer, it instead became the first Marvel film to have a 45-day theatrical window in the new deal and arrangements made between studios and exhibitors, which Disney CEO Bob Chapek called an “interesting experiment” (Chitwood, USA). While the risk of infections was a reason for audiences to stay at home during the summer of 2021, the shorter theatrical window was another factor that was preventing theatres from returning to pre-pandemic levels. Rebecca Rubin writes that following *Black Widow*’s hybrid release, Disney disclosed statistics and figures for the film’s home release, where it generated \$60 million in the US from Disney+, compared to \$80 million from theatres (2021). Although the box-office revenue was greater, the exact percentage that Disney took from each model is unknown. However, the fact that the studio did not decide to take this approach with *Shang-Chi* two months later, suggests that theatrical revenue is preferred, as it has greater potential in the subsequent weeks after release. *Black Widow*’s figures demonstrate that there are audiences that were not ready to return to the cinema, and this period and the use of simultaneous releases, both encouraged audiences to return, whilst not alienating those that did not. Moreover, one of the ways exhibitors tried to further entice audiences to return and maximise their profits, was through the use of advertisements.

Prior to the pandemic, exhibitors had used advertisements to sway audiences towards cinemas and away from streaming. For instance, as explored in Chapter 6, in January 2020, Vue launched their campaign, *Get Lost in Great Stories* starring John Boyega who navigates a digital world to highlight the importance of the theatrical environment for movie-watching, when compared to viewings on personal devices. As cinemas reopened post-lockdown in May 2021, Vue resumed

showing this advert in front of every feature presentation, however, this time it would be viewed in light of new circumstances. Although viewing the ad after multiple lockdowns still persuades audiences to choose the movie theatre over a digital device, the central line of “getting lost in stories” enforces greater connotations of escapism. After several periods of stay-at-home orders and isolations, it reiterates the effect that movies have to temporarily detach from reality and transport audiences to new worlds, and at the same time, the very aesthetics of the cinema screen and digital technology can help audiences to feel immersed. Immersive technology and the spectacle of cinema is something that has been explored through various digital formats, such as IMAX and 3D, in the first section of this thesis, but after a period of cinema’s extended absence due to Covid, the campaign suggests that visiting a movie theatre allows audiences to escape and get immersed in storytelling, that is not possible with home viewings on personal devices. Cinemas emphasising the spectacle of the big screen to entice audiences to return is also similar to the way that widescreen aimed to lure audiences back following the launch of the television in the 1950s. It is evident that exhibitors are emphasising the aesthetic and the experience associated with the big screen to further demonstrate what they can offer audiences, that streaming can not at home. This is combined with the use of celebrity and star power, such as Vue and John Boyega, to reiterate and legitimise this message further, and ultimately entice more audiences. But this strategy has also been used by other exhibitors too.

In September 2021, AMC Cinemas, which owns Odeon in the UK, launched a \$25 million campaign featuring Nicole Kidman to emphasise the magic of the cinema screen (D’Alessandro, 2021). The ads were shown on network television in America, attached to films in AMC theatres and Odeon cinemas globally, as well as throughout social media platforms. Anthony D’Alessandro notes that Kidman was a “smart choice for a big star booking” as she is aimed at the “older female demographic” who had been hesitant to return to cinemas during the pandemic. The ad itself highlights the safety of the movie theatre, and at the same time, uses the slogan “We Make Movies Better” to reinforce the cinematic experience that appeals to movie-goers. Furthermore, Kidman narrates a message that points out “dazzling images on a huge silver screen” and the fact that “heartbreak feels good in a place like this.” Initially, these highlight appealing elements of the cinema, but in the months following the launch of the ad, has also become a cult attraction itself. Jake Kring-Schreifels writes that some audiences first saw the campaign as puzzling or uncanny but soon “relented to the unique, campy charm” of it, which sparked an array of fanatical expressions, from cheering to customised t-shirts and unironic script recitations (2022). Although it was an advert initially crafted to entice audiences into returning to the magic of the big screen, the impact of the ad in the months that followed demonstrated a sense of community and shared visual experience that no at-home viewing offered, which was ultimately another reason for movie-goers to return. However, not all ad campaigns

featured celebrity brand deals, and others that were created for the reopenings tended to focus on the activity and experience of cinema-going that had been absent throughout the lockdowns.

In the United Kingdom, Cineworld's ad campaigns that ran over the summer of 2021 relied heavily on social media and the experiences of actual movie-goers themselves. One advert, which was posted across social platforms and shown before films, featured a slideshow of overlapping screenshots of real tweets posted by Cineworld followers that all featured the hashtag #MissingCineworld and a brief line about why. The ad then ends with the slogan "Get ready to feel more again," which extends from the pre-pandemic slogan of simply "Get ready to feel more." Another advert showed videos and photos of Cineworld followers recreating the cinema experience in their homes, from hand-drawn cinema tickets and listings to homemade snacks, which then ends again with the post-Covid slogan. Both of these adverts emphasise the additional elements that cinemas offer, such as community, routine and practices, and wonder, which ultimately create the theatrical experience that allows audiences to feel more, and movies to feel better. It also suggests that throughout the closure of cinemas, when home viewing was the only option, this special feeling associated with the cinema had disappeared from the pastime of film consumption, but as cinemas returned, so did this enhanced feeling.

Although certain streaming services, including Amazon Prime and Disney+, introduced watch parties to allow audiences to simultaneously stream the same title with an additional chat box, the experience of going to the cinema is something that simply could not be recreated to its full experience at home. Moreover, the juxtaposition between cinema and home viewing in adverts is something that was not only explored by exhibitors but also by the broadband company BT. One of BT's adverts released during the third reopening of cinemas, and shown on televisions, online platforms and in theatres, featured a family watching a film on a cinema screen when it suddenly stops to buffer. Buffering or waiting for a movie to load is something that never occurs during theatrical exhibition but is likely something that audiences have experienced with digital or home viewings. The ad then states that "you won't accept buffering in the cinema, so why should you at home," which is followed by the statistic that "88% of UK cinemas rely on BT broadband to bring the films you love to the big screen". This advert uses the reliability and experience that is associated with the cinema to promote and improve home viewing, by suggesting that switching to BT broadband can make home viewings uninterrupted as if it were the cinema itself. Throughout all of these adverts, there is an effort to grab the attention of audiences, as some of them remain conflicted or hesitant about returning to the cinema following a pandemic. Between May and September 2021, adverts were made to attract audiences to the big screen or to inspire them to stay home and improve their home screen to be more like a movie theatre, which further highlights the discourse around cinema and streaming.

At the end of September 2021, *No Time to Die* was released in the United Kingdom and released the following week in the United States. As the first film to be postponed as a result of the virus back in March 2020, it was also the film that marked the end of the reopening period for cinemas, culminating together adverts and campaigns, audience behaviours, and the box office.

Jonathan Dean notes that the September 2021 release of *No Time to Die* was a turning point for the film industry, as it was a highly anticipated film that had been delayed four times, and then responsible for bringing back hordes of ticket-buyers to protect the future of the industry (2021). The film was the 25th instalment in the James Bond franchise, featuring the final appearance of Daniel Craig as 007. Bradshaw notes that James Bond is a global cultural phenomenon and the ability for the character to never age across multiple actors has meant that it has become both a cash cow for Eon Productions and a pivotal cultural export for Britain, following appearances with the Queen at the 2012 London Olympics (2022). Audiences were waiting for Bond's return since 2015's *Spectre* (Mendes, UK), with the virus making them wait even longer in 2020. But throughout the summer of 2021, audiences had four months to test their willingness to return to cinemas. Ben Dalton writes that for *No Time to Die's* release, exhibitors employed 10% extra frontline staff and some Cineworld sites even showed the film up to 50 times a day (2021). Universal also released it in over 700 UK cinemas, making it the widest since the pandemic arrived. By the time of the film's opening weekend, the key questions were: would *No Time to Die* be the film to bring movie-goers back in the way *Tenet* was envisioned to be the year beforehand, or would audiences still feel uncomfortable to return to cinemas, and instead, wait for the newly agreed shorter theatrical window of 45 days to pass where they could then rent the film digitally in the safety of their own homes?

In its opening weekend in the United Kingdom, *No Time to Die* grossed over £26 million (\$35 million), which exceeded the openings of both *Spectre* and *Skyfall* (2012, Mendes, UK), as well as any other film since the pandemic began (Moore, 2021b). These figures demonstrate that audiences, especially British audiences, had been waiting for the right film before fully returning to cinemas, and the 25th Bond film was exactly it. Sam Moore notes that the film had more than 9000 screenings in the country in a single day, including many sold-out shows. Moreover, the box office success of *No Time to Die* can be attributed to several factors. Firstly, the constant postponements of the movie meant that the eventual release could be seen as a celebration of the end of the pandemic, which again had taken away so much from so many people. Secondly, as stated earlier, it was the final instalment of Daniel Craig's portrayal of James Bond, meaning that it was a climatic chapter of a sub-series spanning 15 years, much like the climactic nature of *Avengers: Endgame*, which had been explored in the first section of this thesis. Finally, again, James Bond is a figure of British pop culture, and the release of a film in the franchise is a cultural event, which ranges from members of the Royal Family attending the

World Premiere in London to sold-out screenings that evoke a sense of community. The success of *No Time to Die* at the box office might be one that demonstrates the survival of the cinema beyond a pandemic, but on the other hand, it might have just been the perfect release for a population that was ready to celebrate amongst others. By contrast, the release and reception of *No Time to Die* overseas further continue the discourse surrounding movie theatres and streaming. In its opening weekend in America, the 25th Bond film grossed just \$56 million, which was lower than projected estimates of between \$60 and \$90 million, as just the week beforehand *Venom: Let There Be Carnage* (2021, Serkis, USA) debuted with \$90 million and broke the record for highest post-Covid opening at the time (Carpenter, 2021). Moreover, Scott Mendelson notes that *No Time to Die* broke an odd box office record, as throughout its run it generated over \$700 million worldwide, being the third highest-grossing Bond film, which was a good achievement for unpredictable circumstances. However, out of every film that grossed over \$700 million worldwide, *No Time to Die's* US domestic gross was the lowest (2021). The difference in the box office between the UK and America does suggest that there was a special appreciation among British audiences that perhaps did not exist across the Atlantic, but at the same time, it does reiterate the importance of the theatrical window, and in particular, the new shorter window in existence.

Rebecca Rubin and Brent Lang note that although the \$774 million global box office generated by *No Time to Die* by the end of November 2021 had been the highest of the year at that point for any Hollywood movie, the studio still needed \$900 million to break even (2021). The pandemic meant that turning a profit for films with budgets between \$100 million and \$200 million was “somewhat unrealistic” but further delays or postponements for a stable theatrical climate could “risk a total industry collapse”. However, a spokesperson for MGM stated that the 25th Bond film had in fact “exceeded theatrical estimates” for the uncertain time and would therefore result in a profit for the studio (Rubin and Lang, 2021). Despite not breaking even at the box office, and generating lower American revenues than anticipated, premium video rentals became a second chance for the studio to make a profit. Rubin suggests that American audiences, particularly adults over the age of 45, had been the demographic most concerned about emerging variants of Coronavirus and the age group most hesitant to return to theatres (2021b). However, Rubin continues that 36% of US ticket sales for *No Time to Die* were from audiences over 45, and 57% were from audiences over 35, which was a higher amount than any other pandemic-era movie. What is evident about *No Time to Die's* performance in the US box office is that it brought in older audiences to a level that other 2021 releases did not, as by comparison, audiences over the age of 45 accounted for approximately 21% of all ticket sales at the US box office in 2021. In the UK, according to the BFI statistical yearbooks, cinemagoers over 45 accounted for 26% of the UK box office in 2021, which was a reduction from 32% in 2020 and

33% in 2019. Rubin adds that 25% of *No Time to Die*'s US ticket sales were from audiences visiting the cinema for the first time in 18 months, which does suggest a promising future for the theatrical box office (2021b). Furthermore, with hesitation and prolonged returns to the cinema evident amongst older audiences, it brings further attention to new methods of release, such as PVoD.

As per the new agreement between studios and exhibitors introduced in May 2021, and outlined in the previous chapter, any film that opens with over \$50 million at the US box office obtains a 30-day period of theatrical exclusivity, as opposed to 17 days if under the figure. A similar deal exists in the UK, but for 45 and 30-day periods, respectively. Brueggemann notes that as *No Time to Die* opened to \$56 million, it was released on to PVoD 30 days after cinemas, and it dominated the VoD charts, placing number 1 on iTunes, Apple TV, and Google Play marketplaces (2021b). The Bond film was priced at a \$19.99 premium rental, but the nature of PVoD means that it is uncertain how much revenue that adds to the title's total box office, as these figures are not readily available to the extent that box-office statistics are. However, the MGM spokesperson's confidence that the movie would break even does suggest that PVoD could take it over the \$900 million total, as Brueggemann reported in 2023, after years of speculation, that studios take nearly 80% from PVoD compared to a 50/50 split with cinemas for theatrical releases (2023). Moreover, the audiences who had been hesitant to return to cinemas amid Covid variants still had a viable way to watch the movie, without having to wait an extended period of time, as prior to the pandemic it was 90 days of theatrical exclusivity in the US and 16 weeks in the UK.

In addition, *No Time to Die* also managed to place number 1 on the end-of-year charts for home entertainment retail in the United Kingdom, which includes all digital retail, physical sales, and digital downloads (Ainsley, 2021). Helen Ainsley continues that despite only being released in the last quarter of 2021, *No Time to Die* was still able to top the end-of-year charts with over 430,000 digital downloads. It is uncertain whether these are first-time viewers or audiences who wanted to rewatch the movie after the cinema but does ultimately highlight the demand for digital viewing and the number of people who wanted to watch it at home. Furthermore, while the focus of this chapter has been on cinema and digital viewings, physical media has also been an important part of both the history of film viewing and this thesis. In the UK, *No Time to Die* was released physically just before the Christmas season and earned the biggest week-one sales on Blu-Ray and DVD, with over 621,000 discs sold, which is the highest figure since 2017 (Grater, 2022). Although there has certainly been a growing popularity towards the convenience and accessibility of digital viewing platforms, which has resulted in some studios opting out of physical releases for smaller titles, physical media is still an additional market for film revenues, and a method for audiences to watch and gift film. While the reduced theatrical window might have been a factor that enabled *No Time to Die* to break even by generating

additional revenues in other markets, the 25th Bond film was ultimately still a blockbuster, and to an extent a cultural event in the United Kingdom. *No Time to Die* was the first film delayed as a result of the pandemic, and the last film to test the willingness of audiences to return to reopened movie theatres. However, there are a multitude of other titles that range in budgets, released on both streaming services and in movie theatres, which rely on a stable and viable film industry. So how do these films respond to the new period of theatrical exclusivity, and the audience behaviours that continue to evolve?

In mid-November 2021, *No Time to Die* was released via premium video-on-demand in the UK, but it was still in its 8th week of theatrical release, which was the halfway point for the traditional 16-week window. In Chapter 4, an analysis of *Avengers: Endgame* found that eight weeks into its run, it placed 11th at the UK box office in a total of 210 cinemas. However, during this same period, *No Time to Die* placed 3rd and was still showing in 626 cinemas. For *Avengers: Endgame* it was already levelling off at 8 weeks, but *No Time to Die* still had the potential to generate further revenues. Yet, its subsequent PVoD release countered the cannibalisation factors of a longer theatrical exclusivity window, as audiences had the option of home viewings that they could divert to. However, despite the shorter theatrical windows, Cineworld reported in November 2021 that the month of October generated positive cash flow, and in some cases, box office and concession revenue exceeded 2019 and pre-pandemic levels (Tartaglione, 2021b). This suggests that audiences had the very reason to return to cinemas that exhibitors were worried about throughout the first and second attempts at reopenings in 2020. Audiences were coming to the cinema, and venues could generate revenues, but the films that they were seeing tended to be almost exclusively blockbusters.

In the weekend of November 19-21st 2021, which was *No Time to Die's* 8th week, there were two Hollywood films released. Firstly, *Ghostbusters: Afterlife*, which had a budget of \$75 million, and *King Richard* (2021, Green, USA), which had a budget of \$50 million. Both of these titles are regarded as mid-budget films, as they fit into the range of \$20-75 million, but the former is a legacy sequel to a franchise, bringing back characters and the element of nostalgia from the original films, and the other is biopic drama. *Ghostbusters: Afterlife* placed first at the UK box office, with over £4.3 million from 658 cinemas, whilst *King Richard* debuted at 5th place with a gross of just over £500,000 from 559 venues (BFI, 2021). It is evident that audiences were predominantly visiting cinemas for blockbuster and franchise films, and although there was still viewership for dramas in movie theatres, these are types of films that audiences could afford to wait for the duration of a shorter theatrical window to see at home. In America, these two films also opened alongside each other in the same week, but due to the existence of HBO Max, it meant that *King Richard* would see a simultaneous release on the platform and in theatres. In terms of box office, *Ghostbusters: Afterlife* placed first in the US with \$44

million, and *King Richard* placed 4th with \$5.4 million, which is the same approximate 9:1 ratio that both films had in the UK. However, *Ghostbusters: Afterlife* only had 1.5x the budget of *King Richard*, rather than 9x, which highlights the commercial potential of franchise films, which exhibitors and studios would favour. Furthermore, the fact that *King Richard* had a simultaneous release in the US and still generated a similar ratio to *Ghostbusters* that it did in the UK suggests that despite digital availability and accessibility, there remains an audience who are still determined to visit the movie theatre. Moreover, D'Alessandro notes that US home-viewings of *King Richard* occurred in 707,000 households during its opening week, with the majority of them having a completion rate of 100%, which means no pausing or interruptions (2021b). This suggests that audiences favour watching drama films at home, where they do not have the distractions of others and are able to engage more with the story and content on screen. But if blockbusters are the films that are generating more revenue and offer greater commercial potential, would there still be a place for a variety of movie types in the cinema?

As explored in the previous chapter, throughout the pandemic, several studios experimented and launched their own streaming platforms, which provided an alternative method for release for titles that might not be suited for the post-Covid theatrical climate, such as mid-budget dramas. At the end of Q3 2021, Brandon Katz reported that Paramount Studios, whose streaming service had only launched six months prior, had planned to take a step back from big theatrical productions to focus on content made for streaming, and from a range of the company's intellectual properties (2021). Although Paramount would still produce and release films like *Top Gun: Maverick* in cinemas, they tended to be titles that would benefit from theatrical technology, such as IMAX, that enhance the movie-going experience, as well as the commercial potential of the franchise, and star power of Tom Cruise. For the studio's streaming content, it would include remakes or spin-off television shows for existing properties, like *Star Trek*, as having something that audiences are already familiar with, could be a reason to subscribe to the platform. This is no different for Paramount than what Disney has already produced and released with Disney+ content, including TV shows based on *Marvel* and *Star Wars* characters. It again demonstrates the importance of the subscriber as a reliable metric for estimating revenue, as well as the effort that studios give to acquire subscribers, which has been evident throughout the pandemic, by trialling new release strategies with streaming platforms.

On the other side of the streaming spectrum, Netflix produced and released *Red Notice* (2021, Thurber, USA) in early November, which had a reported budget of \$200 million, making it the most expensive original from the company, overtaking *The Irishman*. Whilst *The Irishman* was a crime drama, *Red Notice* was an action blockbuster, starring Dwayne Johnson, Ryan Reynolds, and Gal Gadot, who are all associated with their own franchises. *Red Notice* did receive a limited theatrical release,

which was with Curzon Cinemas in the UK, but the success of the film came with its streaming release, as it became the most-watched movie in the platform's history, with 328.8 million viewing hours in just a month after its release (Melas, 2021). Moreover, as Netflix and streaming data are often ambiguous, it is unknown as to how much revenue this totals to, or if the film even made a profit, but it again highlights that subscribers are watching it and that subscribers are a powerful tool in the post-Covid industry. Ultimately, it all links back to the theatrical window, as well as the cinema and streaming debate. If an audience member is willing to wait 30 days in the US or 45 days in the UK for a movie like *No Time to Die* to be released at home for a premium rental, what type of content is keeping them entertained in the interim, and what impact is it having on viewing habits?

Claudia Eller writes that the streaming age has blurred the line between television and film, and since the launch of Disney+, gilded properties like *Star Wars* and *Marvel* that had been "stratified as the stuff of movies only", are now released in the television medium to be exploited for their intellectual properties (2021). Prior to Disney+, the US television network ABC had released series based on the Marvel Universe, including *Agents of SHIELD* (2013-2020) and *Agent Carter* (2015-2016), which both feature a supporting character from an early film in the *MCU* in a spin-off series with a new ensemble of characters. Netflix also collaborated with Marvel to create series around the introductions of new characters, whilst acknowledging the events occurring within the *MCU* in the background. This included *Daredevil* (2015-2018), *Jessica Jones* (2015-2019) and more, which culminated in an Avengers-style team-up series *The Defenders* (2017). All of these shows ended by the time Disney+ released its first Marvel series, *WandaVision*, in January 2021. *WandaVision* featured key heroes from the *MCU* as the main characters, which continued in subsequent series, and whilst all mentioned television shows connect to the *MCU* in some regard, the Disney+ shows have become the favoured ones. The Disney+ Marvel shows even constitute the official 'phases' within the franchise, which had typically only consisted of films, despite the presence of the ABC and Netflix shows airing alongside, thus further blurring the lines between film and television. Television has typically been regarded as an additional market to the cinema, which is why models like the theatrical window exist, as they protect the box office revenues from other markets. It is also the reason why throughout the 1950s to 1980s it would take years for films to even appear on a television network following the theatrical release. However, streaming services and the rise of simultaneous or day-and-date releases have meant that movies can appear across cinemas, television, and devices, at the same time globally. Meanwhile, for television shows, there is an even greater emphasis on instance and accessibility. As streaming services can release episodes or whole seasons simultaneously worldwide, it allows for a lack of spoilers for *Marvel* shows, as well as for a greater sense of communal viewing experience.

Coinciding with the time of *Red Notice's* release on Netflix, as well as the *No Time to Die* theatrical exclusivity period, Netflix also released *Squid Game* (2021-), a South Korean drama series, which became the platform's most popular show of all time, with 1.65 billion hours streamed in the first four weeks (Spangler, 2021). *Squid Game* and *Red Notice* were released on the platform at virtually the same time and became Netflix's most-watched television show and movie, respectively. However, just contrasting the amount of viewing hours between the two shows that *Squid Game* accounted for over five times the amount for *Red Notice*. Although *Squid Game* is episodic and it would take a user eight hours to watch the entire series, *Red Notice* is two hours long, which means that the TV show is only four times longer. Ultimately, this ties back to the idea that The Russo Brothers presented in 2019, that binge-watching television shows are making "audiences expect a greater payoff for their commitment", meaning that investing eight hours into *Squid Game* can strengthen their attachment to characters and plot more than they can in a film like *Red Notice* (Buchanan, 2019). It again ties back to the *MCU*, now consisting of both film and television, as it rewards audiences for their commitment and investment by allowing them to reconnect with characters. Whilst the lines between film and television have undoubtedly blurred, this chapter has only briefly touched on the television industry, as its development, complexity, and growth fall beyond the scope of this thesis to analyse its true impact and collision with the film industry.

Another notable moment to observe between the overlap of film and television took place before the pandemic, at the end of 2017. Several film critics and even *Sight & Sound* magazine called *Twin Peaks: The Return* (2017) one of the best films of the year, despite consisting of eighteen episodes (Tartaglione, 2017). If movies and television shows are housed on the same platform, can appear on the same end-of-year lists, and even interconnect with one another in stories, such as in the *MCU*, then in order to truly understand and analyse the debate between cinema and streaming, it should not only focus on movies but should also incorporate television shows and the viewing habits regarding them, too. Moreover, in 2021, Netflix released *The Fear Street Trilogy* (Janiak, USA), which was a trilogy of horror films spanning a town curse over hundreds of years, with each instalment released weekly. While each film was regarded individually, it can also be perceived as a limited television show consisting of three episodes, and by being released on a streaming service, it meant that tropes of TV could transfer to it. For instance, the first and second instalments end with a preview trailer for the succeeding one, and the second and third movies begin with "previously on" recaps of the preceding story. Whilst films in the *MCU* typically use a post-credits scene to tease the next story, *Fear Street* further blurs the line between a television and movie series, as weekly releases aim to maintain the series in the audience's attention for the next seven days, similarly to episodic television releases, whereas *Marvel* are giving a teaser of something to look forward to in the future. If cinemas are to be

geared towards blockbusters or franchise films that offer the commercial potential for studios and exhibitors, mid-budget films may end up as a streaming release, but if streaming services are focussed on the high-attention and investment-driven television shows, do streaming platforms just become another crowded market for a title to be lost in?

The high performance of *No Time to Die* at the UK box office compared to the underperformance in America demonstrates the precarious and unpredictable situation that the pandemic has embedded within the theatrical climate. The debates surrounding cinema and streaming continued months after the third reopening, to understand whether cinemas were going back towards tradition and normality, or if they were to embrace a new normal. What is evident within blockbusters and shorter theatrical windows is that films like *No Time to Die*, which utilise the technological advancements of cinema with formats like IMAX, as well as 4DX (in which Cineworld exhibited the movie), are emphasising the spectacle by offering audiences viewing experiences that they simply cannot replicate at home. If audiences are willing to wait for a shorter window for a PVoD release, then they substitute the technical aesthetic and experience associated with the cinema for a home viewing. It all ties back to the use of advertisements, from Cineworld's "get ready to feel more" to Odeon's "we make movies better," as exhibitors aim to sell an experience that elevates a film viewing beyond a basic screen and a chair. However, not all films exhibited in cinemas are shown in additional formats, and often independent and mid-budget titles are typically presented on just a regular screen. It is in these moments where formats like Luxe or VIP, which may be a limited option, aim to also elevate the viewing experience. Furthermore, Vue CEO Tim Richards stated that "comfortable recliner seats and Dolby Atmos sound systems" are a growing priority in cinema's post-pandemic recovery, as giving audiences the best possible viewing experience is another reason for them to keep returning (Salisbury, 2022). Whether cinemas return to the old traditional norms or not, one certain change that has resulted from the Coronavirus pandemic is the shorter theatrical window.

Whilst day-and-date releases have been around since before Covid, with the likes of Curzon Home Cinema, lockdowns and the pandemic have ultimately brought the strategy to greater attention and made it viable for major studios, most of whom now have their own streaming platforms. The 16-week window was already a lengthy duration for a high-grossing film like *Avengers: Endgame* in 2019, as it levelled off its revenue eight weeks in. The new shorter duration is more equipped for the contemporary climate and still protects a film's revenue by balancing the cannibalisation factors of a theatrical run, with the marketing effects of a shared promotional campaign across multiple release markets. Furthermore, the shorter windows grant greater accessibility and choice to audiences, who have the freedom to choose to wait for a premium rental at home or to see a variety of films in the movie theatre beforehand. The likes of Cineworld Unlimited and Odeon Limitless cards are also

encouraging a greater participation in movie-watching, as viewing is inclusive of a cinema subscription fee, and therefore likely to combat any reluctance to visit a theatre. Cinema subscription passes also therefore promote theatrical viewings for smaller, non-franchise and mid-budget films, as viewings remain inclusive of the price. It is particularly beneficial in light of a shorter window, as these films might have been the ones that could be typically waited for a digital release. However, not all cinema chains have subscription cards, and with a shorter window, what would happen if audiences decided to also wait for the digital releases for blockbuster movies?

Eller writes that the entire ecosystem of the film industry has shifted into the digital age, evident with the advent of streaming, studios introducing their own platforms and the continued blurred line between film and TV (2021). Moreover, studio heads are now thinking beyond the typical theatrical release, as streaming grows as a closer equal to the movie theatre when the previous auxiliary markets of physical media, VoD, and cable television were all viewed as separate markets. The pre-pandemic industry had a clear power relationship between studios and theatre owners, but the focus on streaming makes the post-Covid industry as much about the relationship studios have with streaming. Making content for streaming platforms is just as important as making films that will be released theatrically in the post-pandemic industry, but if the types of content are on par with one another, what beyond an enhanced viewing format is keeping audiences from returning to cinemas when the supply of content is so vast at home?

The coronavirus pandemic brought the industry to a standstill, and for the first time in its history, studios and exhibitors experienced what it would be like if cinemas were shut globally. Coinciding with the release of *No Time to Die* were concerns over a new Coronavirus variant, but what if an additional variant or even new virus entirely emerges that is capable of bringing the film industry to another standstill? For studios, most of the major ones already have their own streaming platform and have used the 2020-2021 lockdowns as an opportunity to experiment with alternative release strategies, such as Disney's premium rentals. For exhibitors, it would mean another moment of frustration, but this time with the knowledge, experiences and lessons learnt from Covid, including safety measures already in place. Finally, for audiences, the experience of visiting a movie theatre may be unavailable, but there would undoubtedly be a vast amount of content made available at home, whether through programming on streaming services or new titles via PVoD. Ultimately, the forced closure of cinemas brings not only the loss of the desired theatrical revenue, which is unfortunate for studios and damaging for cinemas, but eliminates the spectacle of cinema as a movie viewing experience, too. Whilst limited Government support had been introduced to help independent venues, cinemas would still rely on this again in the instance of another pandemic. However, if there is no other pandemic, but still the issue of reduced footfall due to audiences choosing to wait for the

shorter theatrical window to end and for films to be made available at home, how would cinemas, particularly independent venues be able to survive?

Throughout the re-emerged debate between cinemas and streaming, there is an underlying theme of old versus new, of tradition versus innovation. Independent chains like Curzon, as well as arthouse cinemas like the Genesis Cinema in East London, have typically been the venues that do theatrically exhibit Netflix Original Films, which demonstrates an ability to adapt towards new movements. As streaming continues to grow, both in popularity and in the amount of content available, independent venues are the ones more likely to adapt alongside industry shifts. By contrast, it took a global pandemic for chains like Cineworld to even consider a much-needed reduction in the theatrical window. Coronavirus resulted in a rebalancing of power in the film industry, with studios coming out on top, and if studios like Paramount decide to focus more on streaming content, then it will continue to shape the future of the exhibition industries. The prospect of a return to normality for cinemas is ultimately unlikely, but instead, as the effects of the pandemic come to an end, cinemas head towards a new normal that both embraces and updates tradition and will be explored further in the conclusion and coda of this thesis. It is already evident in a shorter theatrical window, perhaps the most significant moment of change to come out of Coronavirus for the film industry, but it is also apparent with multiple studio-owned streaming services, and the release strategy of PVoD continuing to be a viable solution for studios and audiences.

Before the pandemic, the discourse around cinema and streaming was one that viewed them as complementary to one another, rather than at odds, which very much remains the case beyond Covid. At the centre of cinemas and streaming are films and audiences, and in the digital age, accessibility and availability are key factors. Giving audiences the choice between a theatrical viewing experience that emphasises the spectacle, whether in an enhanced format like IMAX or not, or a home viewing that emphasises the convenience, on a streaming service or premium rental, with a new shorter period of theatrical exclusivity, not only allows for freedom, but for the lack of spoilers or missing out. Cinemas can evoke a sense of community, but with the presence of social media, home viewings can also be included in that, and a complimentary balance between two viewing formats is a way that can uphold the future of the film industry, through a pandemic or not.

In conclusion, when cinema was impacted by the Influenza pandemic in 1918 it was at a time when movie theatres were unrivalled as a method of watching films. In the century between Influenza and Coronavirus there have been technological development and digital advancement which shaped the way cinemas have engaged with audiences at the intersection of narrative and spectacle. Digital viewing formats, like IMAX, enhance the immersive viewing experience and at the same time, have

been a way for studios and cinemas to appeal to audiences and combat the growing appeal of the home media markets. From television to physical media like VHS, DVD, and Blu-Ray, these formats have provided an additional market for audiences to view films, but as technology and the internet developed, it paved the way for streaming, which overtook these other markets as the primary alternative to the cinema. Before Coronavirus arrived, there were conversations for the window to be reduced and shortened, as streaming challenged traditional business practices, like the theatrical window, with alternative release strategies. Moreover, streaming services, as well as franchise films, which occupied cinema screens and premium viewing formats, further aided to shifts in audience behaviours and viewing habits. All of these factors have ultimately established the industry situation by the time the next global pandemic arrived in 2020.

The unexpected and sudden emergence of the Coronavirus pandemic in 2020 drastically altered and influenced modern health, global industries, and public behaviours. As studios responded to the virus, there was no immediate urge to focus on exhibitors, as the pandemic created a historic moment to shift focus on streaming, which had already been at the centre of attention prior to Covid's outbreak. This ultimately shifted the power balances at the heart of the industry, which for decades had been a relationship between studios and theatres, but now the relationship between studios and streaming was equally important, and studios ultimately had the upper hand. Coronavirus marked itself as a true catalyst for change, and whilst a reduction in the window, new streaming services or release strategies are factors that might have been implemented regardless, the pandemic has undoubtedly accelerated it.

However, this section of the thesis has been limited to the timeline of *No Time to Die's* release, from the moment it was first delayed in March 2020 to its eventual release after multiple postponements and lockdowns in September 2021. Whilst this has provided a distinct time period to analyse the pandemic and its impact on the film industry, in order to truly understand the direction that the industry heads, it requires a further analysis of key events and moments beyond *No Time to Die*, which are examined in the conclusion and coda of this thesis. From the analysis of the film industry in the timeline of *No Time to Die*, it is evident that franchise films are the ones that are generating more revenues for studios and theatre owners, whereas smaller, mid-budget films have a greater chance of avoiding the crowded box-office and releasing directly to streaming. With a new and reduced theatrical window that varies for how much a film generates at the box office, it does ultimately provide a chance for a variety of films to have releases in both cinemas and on streaming platforms, as complimentary to one another, rather than competition against each other. It is one that allows for the spectacle of the theatrical experience, and at the same time, one that caters for the convenience of staying at home without necessarily missing the online discussions and hype that surrounds a title's

release. Cinema and streaming both aim to promote movie-watching and the pandemic created a situation that encourages new strategies, methods, and experiences to do so. The future of the film industry remains uncertain, and whilst cinemas may never return to the pre-pandemic normality, factors like streaming, social media and audience behaviours, and technology, are continuing to shape and influence the new normal of the industry beyond Coronavirus.

Conclusion

The sudden emergence of Coronavirus in early 2020 was a situation that the film industry was not prepared for. It brought the movie industry to a standstill, with productions shut down and cinemas forced to close in the interest of public safety. As the pandemic continued through multiple lockdowns, which spanned 2020 and the first half of 2021, it created an opportunity for studios to focus on streaming and experiment with new release strategies and platforms. As theatres reopened following the third lockdown in May 2021, studios emerged with the upper hand (Bruggemann, 2020). In January 2020, Netflix had a total of 167.1 million subscribers (Spangler, 2020). Two years later, in January 2022, Netflix had a total of 230.75 million subscribers, and it grew at a rate faster than its own estimates and targets (Maas, 2023). Between the two years, audiences had been confined to their homes with lockdowns for a considerable amount of time and when combined with the launch of several studio-owned streaming platforms, it further confirmed the appeal of home viewing. There was also a reduction to the traditional window in the UK and US, to a duration of 45 and 30 days, respectively, for films that perform over a certain amount in their opening week, and 30 and 17 days, respectively, for those that do not. The relationship between studios and streaming was as significant as the relationship between studios and theatres, and it ultimately marked a new normal within the industry.

The shift has been dramatic. Three years after the first cases of Coronavirus emerged from Wuhan, China, the film industry can now be clearly defined as 'pre-pandemic' and 'post-pandemic.'

The pre-pandemic film industry, which was the focus of Section 1 of this thesis, had been focused on technological development, from the conception of the moving image to the introduction of colour, sound, widescreen, and special effects. In the 21st century, the industry engaged with enhancement and spectacle, from the transition of celluloid to digital, to formats like IMAX moving from museums into narrative cinema at the start of the new millennium before being more available worldwide, as well as the fad of digital 3D in the early 2010s. Furthermore, as technology continued to develop and internet speeds increased in the mid-2000s, it paved the way for online viewings, which provided a new market for film releases, joining the cinema, physical media, and television markets. Developing technology was also enhancing home viewing, as televisions became HD and then 4K, and even 3D during its brief phase of popularity. The internet and technology made films more accessible at home, and this would all contribute to the rise of streaming throughout the late 2010s, which would now bring new films directly to a subscriber's home. Cinema had been regarded as the primary market since the arrival of the feature film in the years before the First World War, but by the mid-2010s, technology allowed streaming to be viewed as the primary alternative to the theatrical release.

Technology was accelerating and yet certain industry practices, such as the theatrical window, remained at a constant between 2006 and 2019.

A key impact of the pandemic therefore was to precipitate a shift in attitudes towards streaming, from its reputation as an emerging technology that posed a threat to theatrical viewing to one that could provide a profitable release for a movie in an unpredictable theatrical climate. The pandemic involved a process of experimentation, where studios trialled new release methods for a variety of movie types, such as PVoD, which granted audiences new titles without waiting for a prolonged delay and without worrying about their health and safety. Furthermore, with some studios having their own streaming services, the focus shifted towards generating a new valuable source of revenue in subscribers, who could be attracted with new titles and maintained with weekly episodic releases for television shows. However, the recent studio focus on streaming has also impacted physical media, as films – especially smaller productions – are now frequently not released on a physical format, in contrast to the start of the millennium, when DVD was deemed the secondary auxiliary market. Moreover, just as streamers looked to entice subscribers, the reopening movie theatres sought to entice audiences to return by emphasising the theatrical experience and foregrounding technical viewing formats, such as IMAX, to give audiences something that could not be achieved or replicated at home. In addition, luxury formats such as LUXE or VIP promised to combine the comfort of home viewing with the aesthetic and technicality of the cinema.

The key difference between home and cinema viewings, apart from technical considerations such as sound quality and screen size, is that viewings at home are usually exclusive to friends and family, whereas cinemas are, of course, shared viewings with many other audience members, including strangers. The pandemic impacted social life on a global scale, and understanding the social behaviours associated with movie-watching is essential to truly understand the post-pandemic industry and the cinema of the future.

One of the key films discussed in this research, and in particular in Section 2, has been 2021's *No Time to Die*. The 25th Bond film was the first to be delayed as a result of the pandemic in March 2020, and its eventual release in late September 2021 in the UK and early October 2021 in the US and other territories marked the end of the virus, as well as initiated the post-pandemic industry. As a timeline, it would plot as 'pre-pandemic,' the period explored in Section 1, 'pandemic,' as in Section 2, and 'post-pandemic,' which is currently ongoing and will be briefly explored throughout this conclusion, and subsequent coda.

As I noted in my Introduction, the title itself of *No Time to Die* is symbolic of the industry's situation during the pandemic. Coronavirus brought a standstill to an industry of development and in

order for it to survive beyond Covid it would need to adapt. It really was *no time for cinema to die*, and the post-pandemic industry is a result of the changes and developments that were able to occur as a result of the decisions influenced by the arrival of the virus. Coronavirus created an opportunity where studios could experiment with new rules, ideas, and decisions, which otherwise could have taken years to occur. Following the release of *No Time to Die* offers us a glimpse of the film industry's 'new normal.'

In December 2021, *Spider-Man: No Way Home* (Watts, USA) was released in cinemas, and eventually became the first post-pandemic film to gross over \$1 billion at the global box office (Rubin, 2021c). This highlights the willingness of audiences to return to the cinema, but at the same time, being a superhero blockbuster and climatic end to the *MCU Spider-Man* trilogy suggests that audiences were returning for movies that could utilise enhanced viewing formats and for characters that they are familiar with and have grown up with. Furthermore, as new releases were also debuting on streaming services at the same time as other movies at the cinema, there was an emphasis from exhibitors to enhance the viewing experience and attract audiences, which was more possible with blockbusters and franchise films. However, whilst straight-to-streaming releases were seen as a threat before the pandemic, they also hold their own merit within the industry and for audiences.

At the 2022 Oscars, *CODA* became the first film released directly onto a streaming service to win Best Picture. Whilst pre-pandemic films like *Roma* and *The Irishman* had streaming releases and were nominated for Best Picture, the nature of the pandemic meant that eligible films in the 2021 and 2022 editions were subject to unpredictable release strategies, and *CODA*'s win helps to legitimise streaming as a viable release method. Moreover, as well as legitimising streaming, Coronavirus also led to representations of the pandemic on film. In Section 2, examples of movies that touch on Covid or other pandemics that are influenced by it were explored, such as *Songbird* (2020, Mason, USA), but in September 2022, *Pearl* (West, USA) was released in America, followed by a UK release in March 2023. Firstly, *Pearl*'s prolonged release across the two territories demonstrates that cinema releases are still not attaining the global and simultaneous reach of streaming. Independent or smaller films are often released strategically to maximise their profits, including avoiding weekends with popular blockbusters also debuting, and being timed to align with festivals and award season buzz. *Pearl* features the 1918 Influenza, which, as discussed in Section 1, had been largely absent in over a century of cinema that followed it. The film was shot in March 2021, during the third wave of Coronavirus, and features hysteria towards influenza, mask-wearing and other precautions within the film (Turner, 2022). The absence of Influenza on film until Coronavirus's arrival suggests that the virus has helped to normalise the representation of the 1918 pandemic, as well as brought it into view within a new cultural framework, with a new relatability amongst audiences.

As the world collectively experienced Coronavirus together, the changes and decisions made in its aftermath were also managed with a collective understanding and realisation of the need for change. Before the pandemic, UK cinema chains Cineworld and Vue were adamant about upholding the then 16-week theatrical window and would choose to not exhibit films that did not respect it. With the window now shortened, it further emphasises that studios are the ones with the power and that exhibitors would have to be flexible in order to maximise their own profits.

In November 2022, Netflix released *Glass Onion: A Knives Out Story* (2022, Johnson, USA) for one week in cinemas before it arrived on the streaming service at the end of December. However, this release included Cineworld and Vue, as well as other major UK chains, which had typically refused to exhibit Netflix films when Curzon and other independent venues would, demonstrating the new standards that can exist in the post-pandemic industry (Dalton, 2022). This release might have been possible because Netflix could tolerate the new shorter window requirement and use this time to generate hype for the film's streaming release, but it also further demonstrates the impact of franchise films. The first *Knives Out* (2019, Johnson, USA) grossed over \$320 million globally from a \$40 million budget and featured an ensemble cast and positive reviews. The sequel, which had the same budget and featured a new cast ensemble, was therefore highly anticipated and a film that audiences would have liked to experience in the cinema, as Lana Murray writes that "murder mysteries capture [the audience] fascination" and offer the crowd-pleasing fun of trying to figure it out amongst fellow moviegoers (2022). Whilst *Glass Onion's* limited theatrical release offered a way for audiences to experience this, it also anticipated that its main audience would come from home streaming. As Netflix continue to not disclose their viewing data and revenues, it remains unknown how much of a success the sequel to *Knives Out* was, but if it did find success in its release strategy, then it could be a significant game-changer for the future, especially for mid-budget films. If Netflix releases more titles with nationwide cinema showings a month before streaming, then the streaming release could be regarded as the primary release, with cinemas simply serving as a teaser or an early preview for audiences who wish to view it in a movie theatre. It offers a way for mid-budget releases to generate the traditionally preferred box-office revenue for a limited time, without being lost among blockbuster releases, before using the marketing for a global streaming release. This is similar to the limited strategies that Netflix implemented with films like *Roma* and *The Irishman* prior to the pandemic, but rather than being limited to Curzon cinemas and independent venues, it was mainstream and nationwide. As several major studios also have their own streaming platforms, such as Disney with Disney+, then there is even the possibility that this evolved release strategy could be more widely accepted, and result in cinema releases as simple teasers for a later streaming debut.

The theatrical window has always been about finding the balance between protecting theatrical revenues and benefiting marketing effects to maximise profit, and throughout this thesis, its history and relationship with other markets have been examined. One of the key examples in this research has been 2009's *Avatar*, in relation to its use of special effects, viewing formats, and 3D, as well as in its examination of the top three highest-grossing films of all time. In an early proposal of this research, its sequel *Avatar: The Way of Water* (2022, Cameron, USA), which was initially set for a 2020 release before the pandemic's arrival was to be a significant area of discussion. The sequel was delayed due to both technology, as it had an extensive visual effects process, and the pandemic, and as a result, the film takes a much smaller role in this thesis. *Avatar: The Way of Water* fell outside the date range examined within Section 2, but its December 2022 release proved to be a box office hit, and the use of visual technology brought 3D back to the forefront of industry discussion in a new way. Audiences' interest in 3D waned throughout the late 2010s, but the technology that was added to cinemas as a result of *Avatar's* success in 2009 remained ever since. Moreover, filmmaker James Cameron notes that since 2009, 3D has eventually "found its level as a consumer choice" meaning that it is an option for audiences should they choose to seek it out or not (in Chilton, 2022). Rather than a fad, 3D has now become an additional format and a tangential viewing experience, which does not take anything away from a regular viewing, and instead reinforces the freedom of choice that studios are giving audiences to attract them. It also means that the format is likely to only be used when it benefits a title's release, rather than have movies converted to 3D as an act of moneymaking. As of February 2024, the film became the third highest-grossing movie of all time. In America, it resulted in seven consecutive number ones at the box office, with 56% of *Avatar: The Way of Water's* ticket sales were from 3D showings, and nearly 30% of the overall ticket sales were generated from premium formats like IMAX and Screen X (Whitten, 2023). In the UK, it also resulted in seven consecutive weeks at the top of the box office, and although the corresponding data is not available for UK cinemas, it is evident from the movie's success that the use of technology, franchises, spectacle and the cinematic environment are powerful tools to draw audiences to the movie theatre. Whilst the film could still be viewed at home with its later digital release, the visual aesthetic of immersive 3D adds to the viewing experience and gives audiences another reason to visit a movie theatre.

A similar success occurred with *Top Gun: Maverick* (2022, Kosinski, USA), a legacy sequel, which became the second highest-grossing film of 2022. What is even more noteworthy is that the film placed first at the US box office in its first, second and fifteenth weeks of release, which can be attributed to the cinematic environment, returning audiences, nostalgia and generated hype. Both *Avatar: The Way of Water* and *Top Gun: Maverick* are examples of franchise films, and further demonstrates how franchises have played a crucial role in the strategy to lure audiences back to the

cinema following the pandemic. The two titles also had success at the UK box office and further relates to the work of Derek Johnson, who argued that franchising is an attempt for studios to navigate both the creative and economic markets (2013, p. 26). The financial success provides a positive outlook for the stability of theatrical exhibition after the virus on an economic level, but the use of other formats of exhibition, from digital 3D to IMAX have not just strengthened the box office but enhance the overall aesthetic and experience of visiting a movie theatre, through the use of a larger screen, surround sound and more comfortable seats. Whilst a focus on franchise films and cinematic universes by exhibitors might have backfired in 2023, as explored in the coda, it is particularly noteworthy that *Avatar: The Way of Water* and *Top Gun: Maverick* are also examples of maximalist films. Where minimalism focuses on “less is more,” maximalism embraces “more is more,” as the movies create an aesthetic of excess (Bracewell and Collins, 2019). Alison Willmore notes that maximalist films feature over-the-top sequences, a lack of subtlety, and effects that remind audiences how much the movies have to offer (2022). Both *Avatar: The Way of Water* and *Top Gun: Maverick* benefit from the big screen, featuring scenes specifically shot with IMAX cameras, and sequences with special effects that take audiences to fantasy oceans or the stratosphere, respectively. It is these factors that further reiterate and emphasise the spectacle of cinema and give audiences a reason to return, especially after an extended period of closures. Other 2022 maximalist titles also earned success and critical acclaim, from *Elvis* (Luhrmann, USA) to *Everything Everywhere All at Once* (The Daniels, USA) and the Bollywood film *RRR* (Rajamouli, India), which further suggests that films that utilise the aesthetic of the big screen to its maximum potential may be the most popular and enticing for the audiences who were absent during the pandemic. But if these, alongside other blockbusters and franchise films, are the ones that are proving to be popular amongst audiences, what does this mean for the slate of movies that cinemas have to offer in the future?

One way that can help to understand the direction that cinemas are heading towards is by examining the slate of movies and showtimes offered to audiences after the pandemic and contrasting it with those from before Covid’s arrival. This uses a similar approach to the work of Barbara Klinger and the wider area of reception studies. Klinger argued that film research should be combined with an intertextual field, such as ethnographic or economic research, to help to understand the ideologies of a society at a moment in time (1997, pp. 107-108). For this research, it is trying to observe two moments in cinema’s history, one year before the pandemic arrived to establish the old normality, and one year after the cinema closures and lockdown situations to try and establish the new norm. Rather than just look at the films released or their subject matter, it is drawing from reception studies and combining it with the intertextual field of a global health pandemic, as well as the social, economic and political influences that had an impact on film releases during these two moments in cinema’s

history. If there is truly a new framework within the industry, that prioritises blockbusters or has been shaped by the dominance of streaming services who did not shut down during Coronavirus, then it would be evident within this comparison.

The following information is gathered from showtimes from four cinemas in East London:

- Odeon Greenwich (OG): an 18-screen multiplex chain cinema, which includes one screen with an upgraded premium viewing format in IMAX.
- Odeon Surrey Quays (OSQ): a 9-screen multiplex chain, which does not have any upgraded premium viewing formats.
- Curzon Aldgate (CA): a 4-screen chain venue that specialises in arthouse cinema and has an accompanying streaming platform.
- Genesis Cinema (GC): a 5-screen fully independent cinema that includes two boutique screens that feature more relaxed sofas.

Although these four venues are in a circle with a radius of 2 miles, which also includes Vue and Cineworld sites, the decision to focus on just these four helps to establish four varying types of cinemas for contrasting data. Furthermore, as they are near to one another, they also demonstrate what is offered to local audiences.

For the data, the showtimes for one cinema week are examined from both before and after the pandemic. The selected weeks are also taken from cinema working days, which means the week commences on a Friday and ends on the following Thursday. The weeks observed are:

- Pre-pandemic: Friday February 28th 2020 – Thursday March 5th 2020 (2020 W9)
- Post-pandemic: Friday March 3rd 2023 – Thursday March 9th 2023 (2023 W9)

These weeks have been chosen as they are both the ninth weeks of the respective years and do not include school or public holidays. In addition, for the pre-pandemic selection, although the following week (2020 W10) was the final full week of showings before cinemas closed, it was also met with caution for the increasing number of cases, which might have impacted the showtimes. Furthermore, the decision to use showtimes from 2023 instead of 2022 was also made to establish a sense of normality by allowing enough time to pass since the final reopening of venues. There is also a specific focus on three days of the week, Friday (F), Saturday (SA) and Thursday (TH), as well as the number of showtimes that accommodated blockbusters (films belonging to franchises or genre movies with budgets greater than \$50 million) to help interpret the data. Below is a table of key statistics taken from each cinema and for each week.

Year/Week		2020 W9				2023 W9			
Cinema		OG	OSQ	CA	GC	OG	OSQ	CA	GC
Screens		18	9	4	5	18	9	4	5
F	No. of films	15	12	7	8	12	9	6	8
	No. of showtimes	53	34	16	12	47	30	16	13
	% of showtimes that belong to blockbusters	64.1%	64.7%	6.25%	16.7%	74.5%	76.7%	68.75%	41.2%
	Earliest showtime	11:20	12:10	12:15	15:10	13:10	13:10	12:20	14:10
	Latest showtime	22:40	23:00	21:20	21:10	23:00	21:30	21:00	21:05
	SA	No. of films	20	16	7	11	14	12	6
No. of showtimes		77	42	16	23	64	38	16	19
% of showtimes that belong to blockbusters		68.8%	69.0%	6.25%	30.4%	75%	73.7%	68.75%	52.6%
Earliest showtime		10:00	10:00	12:15	10:45	10:00	10:10	11:40	13:05
Latest showtime		22:40	23:00	21:20	21:10	23:00	21:30	21:20	21:00
TH		No. of films	15	11	8	8	11	8	6
	No. of showtimes	51	32	16	18	43	24	16	18
	% of showtimes that belong to blockbusters	64.7%	65.6%	6.25%	11.1%	74.4%	75%	68.75%	44.4%
	Earliest showtime	11:20	12:10	12:15	12:50	13:10	13:00	12:20	14:15
	Latest showtime	21:00	21:00	21:20	21:00	22:10	20:30	21:00	20:50

One significant finding from the data is that following the pandemic, both Curzon Aldgate and the Genesis Cinema have had a dramatic increase in the percentage of blockbuster films exhibited when compared to beforehand. In 2020, Curzon showed predominately foreign films and dramas including *Parasite* (2019, Joon-ho, South Korea) and *Portrait of a Lady on Fire* (2019, Sciamma, France), with the only blockbuster film being *1917* (2019, Mendes, UK), which did not belong to an existing franchise. In 2023, Curzon Aldgate's showtimes include *Creed III* (2023, Jordan, USA) and *Ant-Man and the Wasp: Quantumania* (2023, Reed, USA), as well as the original sci-fi film *65* (2023, Beck and Woods, USA). Whilst Genesis Cinema offered the most dramas and foreign films from any venue in 2023, which

included *Close* (2022, Dhont, Belgium), it is important to note that *Close* was exhibited in other Curzon venues in London in the same week, and a variety of other foreign titles and smaller movies were available to rent online on Curzon Home Cinema.

In addition, whilst the latest showtime of each venue was noted, it did not take into consideration the end time, but by noting the start times it is evident that CA's hours of operation were not affected, whereas GC tended to open later in 2023 than 2020. Furthermore, for both Odeon venues, Saturday was the only day observed that was not affected by differing opening times, although it still played more screenings in 2020. In 2020, both Friday and Thursday had earlier start times in both Odeon venues, which is attributed to more showtimes in total. However, in 2020, OG's latest Thursday showtime was earlier than in 2023, demonstrating a shift in the operating hours in the days of the working week. Having later showtimes allows for more people to visit the cinema after work, suggesting a greater footfall during these performances. The fact that the larger of the two Odeon venues was the one that opened later in 2023 demonstrates an emphasis on trying to generate as much revenue as possible, as more screens allow for a greater variety of films to be offered.

Whilst the percentages of blockbusters in both Odeon venues also increased between 2020 and 2023, they were virtually identical to one another, and not as significant of an increase as the other venues observed. However, there is a difference between the films that constitute the remaining percentages. For instance, in 2023, OSQ, the smaller venue, screened exclusively Western titles but also featured mid-budget and drama films like *What's Love Got to Do with It?* (2023, Kapur, UK), which were also shown at OG, along with a select number of Bollywood movies and other western dramas with limited runs like *Champions* (2023, Farrelly, USA). This demonstrates that a venue with a greater number of screens is able to exhibit films of greater diversity and inclusivity, which can further appeal to local communities. Moreover, aside from CA, the other three venues opened earlier and increased their number of showtimes on Saturdays in 2023, which was also the case in 2020. There is also an increase in the number of films shown on Saturdays, which are typically family movies in the early morning shows, which particularly brings up GC's percentage of blockbusters on this specific day of the week. This data provides a range of possible findings, and a wider examination of additional venues or different weeks could provide even more statistics, but what does this all suggest?

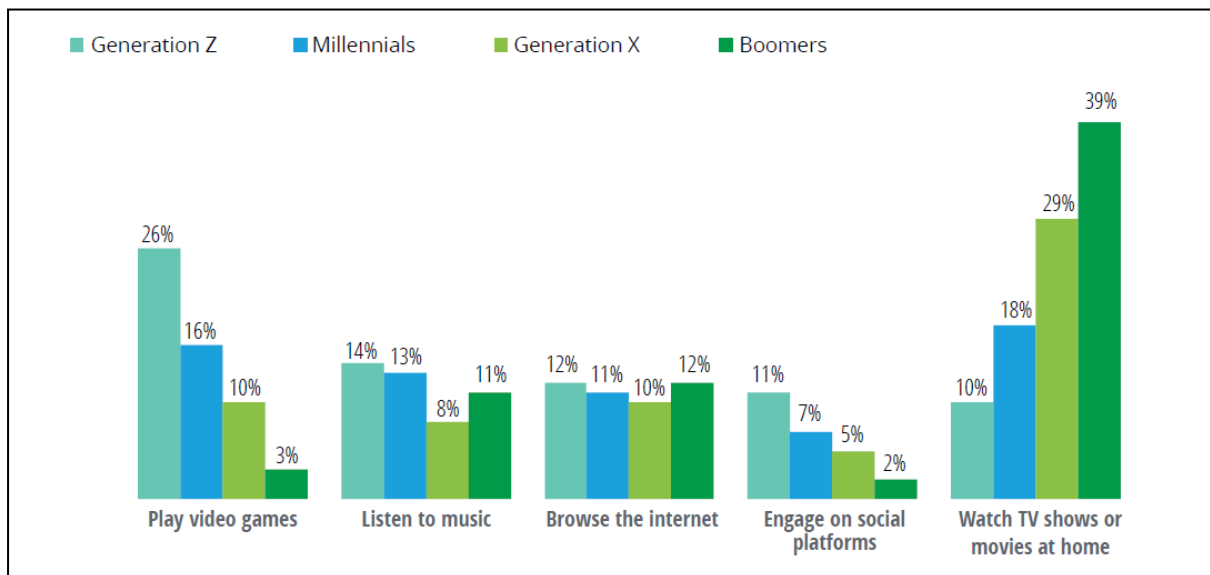
Ultimately, the findings help to demonstrate that a new equilibrium has been established within the exhibition industries. It demonstrates that studios are the ones that hold the power, and exhibitors are the ones that have adapted to accommodate a new norm. For instance, later opening times and performances at times of the day with a greater footfall, and an increase in the number of blockbusters are all attempts to generate additional revenue. Studios have formed a new relationship

with streaming amid the pandemic that can bring in profits. In 2012, Roman Lobato argued that streaming services have digitally transformed television, but now the same has happened for film and cinema (2012, pp. 6-7). Prior to the pandemic, streaming films were often disregarded in industry discussion and discourse, but as a result of cinemas closing during Coronavirus, streaming titles were embraced, and platforms were invested in by studios. Watching a movie digitally has very much become a legitimate and accepted form of consumption, and the overall change in the relationship between theatres, studios and streaming has created a new landscape for cinema. Moreover, whilst the new industrial situation that cinema and streaming have found themselves in is relatively new, it has already become apparent within scholarly work, such as in the 2024 article "Theatrical Distribution or Online Streaming? Release Strategies in Europe in Times of Disruption and Change" by Roderik Smits. Smits observed the relations between streaming platforms and cinema exhibitors amid the pandemic and argued that it is one of both conflict and collaboration (pp. 87-88). In addition, Smits' research agrees very much with the findings of this thesis, that firstly, shorter release windows were called for before the pandemic but accelerated as a result of it, and secondly, studios have emerged from Coronavirus as the ones with the most power (pp. 103-104). However, whilst there has been changes to release strategies and power balances, this conclusion will also observe the changes to audience behaviours and the overall viewing experience that have been influenced by the pandemic and the closures of movie theatres.

The pandemic marked a moment in history when audiences could not watch movies in cinemas for an extended period of time. For younger audiences, in particular, this meant that a significant portion of their leisure and free time was spent without the availability of cinemas. In order to understand the new industrial landscape, it is important to draw from production and reception studies and investigate the audience demographics, ethnographic research and the cultural frameworks that surround and influence cinema. This involves looking at the work of John Caldwell and Barbara Klinger, as observed in the Literature Review, to understand the film industry through its contextual influences, and in particular, its audience. During the pandemic, older generations would have remembered the theatrical experience that they would be returning to once cinemas reopened, but younger audiences who spent their teenage years in lockdowns may have not formed the same connection with movie theatres. It was not so much about exhibitors wanting younger audiences to return, but instead, wanting them to visit in the first place, to choose the cinema as their pastime. Therefore, to understand younger audiences and their relationship with film, it is important to draw from the approaches of production, cultural and reception studies, to understand the contextual and social influences that have shaped younger generations, their hobbies and their pastimes.

Todd Spangler notes that a study conducted by Deloitte discovered that watching film or television at home was only the 5th choice for a pastime at home by Generation Z (born between 1997-2012), whereas it was the most popular by the other age groups studied: Millennials (born 1981-1996), Generation X (born 1965-1980) and Boomers (born 1946-1964) (2021). By contrast, playing video games and engaging on social media platforms were much preferred by Gen Z over other age groups, whereas film viewings are less popular as they lack the social aspect, if not a watch party. Whilst the gaming industry was also substantially impacted by Coronavirus on a corporate and manufacturing level, lockdowns marked a time of accelerated play on a consumer level. Online gaming provided a way for gamers, including Gen Z, to connect with others and maintain the social aspect of life during Covid. In addition, there was no comparable sense of a ‘return to gaming’, as it had never lapsed due to the pandemic. Below is a full graph of the findings by Spangler:

Graph showing ‘Top 5 Entertainment Activities of U.S. Consumers by Age Group’



(Spangler, 2021b)

The data surrounding this study forms a much bigger area of research that focuses on shifting behaviours and the evolving nature of leisure, and although it does have a significant impact on the future of movie-watching, it is something that would need to be examined further and requires additional research to truly understand. From a brief glimpse at the data above, it is evident that younger generations would prefer to occupy their time at home with other activities than watching films, even if it is online short-form content on platforms like TikTok on YouTube. Generation Z are the first generation to experience their childhood in a world with social media and the internet, as the oldest members of Gen Z would have been just 8 years old in 2005, the year of YouTube’s launch. Online media and video sharing apps have also changed significantly between 2005 and 2023, as

platforms like YouTube, which had been exclusively for long form content in the 2010s, began to focus more on short form content. In July 2021, YouTube launched YouTube Shorts globally, which rivalled TikTok videos and Instagram reels. Short form videos are between 10 and 90 seconds long, with YouTube having a maximum duration of 60 seconds, and encourage users to scroll through videos en masse. As the user engages more with videos, the apps are using algorithms and for-you-pages to curate a scrolling feed to the user's personal interests and desires. While these efforts are design to keep users on the app, it does strike similarities with the way that Netflix and streaming companies use promotional material and algorithms to personally cater to the individual. The use of technology in social media apps are changing the ways that audiences, particularly younger generations who spend more of their free time on the platforms, are engaging with videos and content, and ultimately impacts how they are engaging with films and cinema, too.

Younger generations are essentially the future of the new equilibrium that exists in the post-pandemic film industry, and understanding where that industry is heading involves understanding other entertainment forms that are developing alongside. Whilst social media has already influenced how people engage with film viewing and fandom since before Covid, and group viewings became an integral part of the social aspect of film consumption during lockdown, the role that social media plays in the viewing habits of the future is already evident.

As discussed, *Spider-Man: No Way Home* was the first post-pandemic film to gross over \$1 billion, but it also had a promotional campaign with a budget of over \$200 million (D'Alessandro, 2021c). Its promotional budget was higher than any previous post-pandemic film at the time, but what was particularly noteworthy was the use of social media, particularly TikTok, as a key marketing strategy. Anthony D'Alessandro continues that TikTok is essentially a community of a billion-plus and the film utilised it in multiple ways, including engagement with creators, some of whom even appear in the movie, an account featuring actors providing additional content, and hype generated by other creators, with news, speculations, and rumours circulating throughout the whole of 2021. When the film was released, theatres were full and audiences were recording their experiences, including audience reactions to scenes and other fan-serving moments from the movie, which are filled with screams and applause. TikTok bottled the feeling of opening night into short-form videos on the platform, and the post-release hype gave a reason for audiences, particularly younger ones, to go to the cinema and experience it for themselves. This links back to the ideas of shared viewing explored earlier in this thesis, from opening nights to season finale viewing parties of a television show, and it highlights the feeling of inclusion that cinemas offer, as well as community amongst fellow movie-goers. Whilst viewing parties can be thrown at home, sharing a viewing of a movie with a group of strangers in the cinema is a unique feeling and one that people would want to replicate if they saw it

on social media, and be part of a trend. Whilst these behaviours were also disruptive to other moviegoers, the videos of movie theatres cheering during *Spider-Man: No Way Home* were shared in compilations online by the studio and even by actor Tom Holland, which legitimises and essentially promotes and endorses the actions. To have crowds of people celebrate together in a movie theatre was impossible with restrictions and guidelines from the previous two years, and although films like *Tenet* and *No Time to Die* have offered glimpses of this, *No Way Home* was the title that truly embraced the idea of being together in a movie theatre. For younger generations, who experienced the pandemic and a significant part of their youth without movie theatres, it is trends, releases, and experiences like this that become events that encourage a greater participation in movie-watching, and it continued throughout 2022.

In July 2022, surrounding the release of *Minions: The Rise of Gru* (Balda, USA), a group of Australian teens posted a TikTok video of themselves going to see the movie in theatres whilst wearing suits with the hashtag #GentleMinions. The teenagers also applaud the film and celebrate moments exaggeratedly. The video became viral and shortly after #GentleMinions became a global trend that other movie-goers participated in (Fahy, 2022). On one hand, the trend was recognised by the studio, Universal, who reposted videos onto their online platforms, but on the other hand, some exhibitors, including UK chain Odeon, had to ban moviegoers from wearing suits due to disruptive behaviours (Hirwani, 2022). What started as a video from teenagers in Australia grew to global recognition, which not only highlights the power of social media but the idea that people want to feel a part of something too. Participating in a trend or wanting to avoid the feeling of missing out – also referred to as FOMO – are behaviours that society developed as a result of social media and the internet, and are becoming more apparent in younger generations, who grow up alongside digital technology and media. In terms of film, trends that get people to visit the cinema, whether #GentleMinions or the viral videos from *Spider-Man: No Way Home*, could become a pivotal tool in movie marketing, and the use of audiences filming footage from the screen to post online could become more widely accepted. Following #GentleMinions, Vue announced exclusive showings of the film that encouraged the trend and suit-wearing. By offering these relaxed viewings and promoting these behaviours, it ultimately helps to market the film and attract audiences, thus generating revenues for both the studio and the exhibitor.

Arifa Akbar writes that following the pandemic there has been an increase in disruptive behaviour at plays and stage theatre performances, from drunk and distracting behaviour, loud snacks, applause, and the use of mobile phones by younger generations (2023). Although theatres have increased the number of relaxed performances which do welcome these behaviours, as traditional rules and policies are eased to grant greater accessibility for those with learning disabilities or autism, it potentially welcomes disruptive behaviours into regular performances. The BFI Southbank also have

relaxed performances for films, and some venues have had special Parent and Baby or Silver Screen (for older moviegoers) screenings since before the pandemic. Therefore, if cinemas do encourage the use of mobile phones for online content on social media platforms in special screenings, it could become a way to entice Gen Z audiences, for whom movie-watching is only the fifth most popular pastime, to visit the cinema. If younger audiences are only visiting the cinema for special occasions and to follow trends, these eased policies could further invite and legitimise casual behaviours. Ultimately, it would skew the cinemagoing audience towards the younger audience, which as a result, could deter older viewers who are familiar with traditional practices, and have spent years watching cinema advertisements that remind audiences to turn off their phones.

Coronavirus established a new normal in the industry, and for audiences, it means re-learning behaviours associated with the practice of movie-going. It is a balance between the traditions that older generations are used to, and the new environments and policies that can attract younger audiences. Movie watching is ultimately a pastime in the grand scheme of society, and to get audiences to choose the cinema as the pastime requires it to be interesting and accommodating. Theatre owners continue to use premium formats like IMAX and 4DX, as well as luxury formats like LUXE to emphasise spectacle and offer an experience that can not be achieved at home. However, what has also emerged from the pandemic has been a shift in the power balances in the industry, with studios emerging with the upper hand. To understand what the film industry and movie-going future might look like, it requires an understanding of the desires of studios, as well as the unfolding relationships they hold with theatre owners and streaming platforms.

From the acceptance of streaming to shorter theatrical windows, and from cinemas exhibiting more blockbuster films to younger audiences watching fewer movies at home, multiple factors are helping to define the new industry after the pandemic. Furthermore, in a 2021 episode of *Hot Ones* (2015-), an online talk show where celebrity guests answer questions while consuming a platter of increasingly spicy chicken wings, Matt Damon commented on the state of the home media markets, which differs drastically post-Covid to what it was at the start of the millennium. Damon was asked “why don’t they make movies like they used to?” to which he answered that in the past, a smaller, mid-budget film would have a theatrical release and then the DVD market was essentially a second chance to earn revenue and a profit. But now, technology has made the home media market obsolete, so if a film made today does not generate profit from a theatrical release, there is no second chance with physical media formats. Instead, in order to maximise their profits, studios might choose to focus on the streaming releases of films that do not have commercial potential in the first place. As observed in the differences in showtimes between 2020 and 2023 venues, exhibitors are focussing on more profitable titles to generate revenues. A theatrical revenue for smaller and independent films is not

entirely necessary and can still lead to critical success and acclaim, as with *CODA*. Streaming can also provide an additional revenue for other films, by selling the rights to streaming companies following a theatrical release, or through new strategies like PVoD, too. While the DVD and home media market was evidently secondary to the theatrical release at the start of the millennium, the continued focus on streaming by studios has meant that streaming releases are as significant and profitable as cinema releases, depending on the budget of the title. It further reiterates just how much the industry has changed as a result of the pandemic's arrival and impact. Whilst films like *Spider-Man: No Way Home*, *Top Gun: Maverick* and *Avatar: The Way of Water* offer a glimpse into a positive box office and what the future of the industry might look like, the timeline of this thesis only offers a glimpse into the extent of these changes and acts as a stepping-stone for future research to take place and understand the rapidly evolving nature of the new industry.

Ultimately, the arrival of Coronavirus was sudden and unexpected, and its ability to shut down the film industry on a global level allowed streaming to grow in the absence of cinema. This in turn sparked moments of flexibility, frustration and experimentation among studios, streamers, and exhibitors, all of which evolved from the pre-existing debate around cinema and streaming. As the pandemic ended, it paved the way for a new equilibrium and an opportunity for new practices to be followed.

At the centre of the post-pandemic industry is a new balance of power that has positioned studios on top, and a continued desire to generate profits throughout. Studios experimented with streaming and have found viable releases under new strategies like PVoD, and shorter lengths in periods of theatrical exclusivity. Whilst the industry before the pandemic was about a relationship between the studios and theatre owners, it is now as much about the relationship between studios and streaming, too. For exhibitors, there remains not just the desire to generate revenues, but the need to, in order to ensure the survival of cinema. By offering more blockbusters and premium viewing formats it is enticing audiences back with an experience and spectacle that can not be achieved at home. Audiences have the choice to choose where they watch their movies, but for younger generations, who will form the future of movie-going, there needs to be a reason for them to visit the cinema, and this is already evident from the use of online trends and theatrical release events to entice and lure audiences. Furthermore, for older audiences, who are used to the traditions of movie-going, there also needs to be a reason for them to visit a movie theatre, whether through the continued use of cinema loyalty programs, maximalist films, or nostalgia. The shorter theatrical window and convenience of the streaming markets are making it easier than ever to watch the latest films at home, but as long as cinema can adapt to the industry and society around it, ensures that it is no time to die.

Coronavirus was a catalyst for accelerated change in the industry, and although the true extent of these changes will not be understood for years to come, the future of film exhibition and distribution will never be the entirely the same as it was before the pandemic. Digital technology has always intended to enhance a previous version, and it is due to a global pandemic that the post-pandemic cinema inherits the traditions and histories of its past, whilst evolving and adapting for a modern, digital, and online age.

Coda: 2023

The original timeframe for the discussion of Coronavirus's impact on the film industry was centred around the initial postponement and eventual release of *No Time to Die*. The conclusion served as an assessment of the industry as it progressed beyond the Bond film's release, and examined notable moments and releases, such as those of *Spider-Man: No Way Home* and *Avatar: The Way of Water*. But in 2023 there have been notable events that occurred which have demonstrated that the post-pandemic situation was very much still in flux, and therefore it felt beneficial to include an assessment of 2023 in a coda in this thesis.

2023 was particularly notable in an attempt to shape what the UK film exhibition and distribution industries might look like in the future. While there was an array of blockbuster releases, that theatres exhibited in premium and luxury formats, some of these had disappointing performances at the box office.

Between May and July 2023, there were several blockbuster releases that underperformed. Both *Indiana Jones: The Dial of Destiny* (Mangold, USA) and *Transformers: Rise of the Beasts* (Cagle Jr, USA) became the lowest grossing instalments in the respective franchises, while films like *Fast X* (Letierrier, USA) and *Mission: Impossible - Dead Reckoning - Part One* (McQuarrie, USA) just about broke even but remained considerably lower than studio expectations and predictions. In addition, the release of *The Little Mermaid* (Marshall, USA) continued Disney's efforts to remake popular animated films in live action, but unlike previously successful attempts, *The Little Mermaid* also underperformed. This suggests that whilst studios have been focussed on making sequels to exploit existing characters, properties, and fanbases, there is an oversaturation in the market that might have deterred audiences away. One of the most notable box office flops of 2023 was the release of *The Flash* (Muschietti, USA).

The Flash was released in June 2023, and much like *Spider-Man: No Way Home*, featured the return of multiple characters from older films based on DC Comics, including Michael Keaton's Batman. Whilst the film did top the UK box office in its opening weekend with £4.2 million, it received mixed reviews and was labelled a box office bomb (Ramachandran, 2023). Owen Gleiberman writes that the more comic-book movies that are released, the more they look like every other comic-book movie, which has led to superhero fatigue amongst audiences (2023). Gleiberman continues that superhero films need to stand out on their own, and previous 2023 releases like *Guardians of the Galaxy: Vol. 3* (Gunn, USA) and the animated *Spider-Man: Across the Spider-Verse* (Powers et al, USA) were able to achieve this, leading to commercial and critical success. This analysis can extend beyond superhero films and to blockbusters in general. In order to attract audiences to the cinema, it requires more than premium formats to entice a visit, but instead the overall subject matter of the film too.

Between April and June 2023, Netflix added an additional 5.89 million new subscribers, further demonstrating the growing appeal of streaming movies and television shows at home (Maas, 2023b). Studios with their own streaming services were also able to later release underperforming blockbusters to their platform and further appeal to entice new subscribers. The popularity of streaming, along with the shorter theatrical window now in place, are further reiterating the need for something new to entice audiences to the cinema. With an oversaturation of blockbusters released in theatres, they need to stand out from one another, and be event-like releases that audiences would not want to miss out on. Whilst this was evident in *No Time to Die*, and more so in *Spider-Man: No Way Home* in 2021, audiences want to be a part of a collective viewing. Although *Spider-Man: No Way Home* had fan serving moments and nostalgia that many of the underperforming summer 2023 blockbusters mentioned also had, it was also a trend that invited greater audience participation. Therefore, the use of trends and social media, combined with the act of cinemagoing, is the key to a successful theatrical release for films in the future.

One month after the release of *The Flash* was also the most significant trend for movie-going in not just the summer of 2023, but the entire year. On the weekend of July 21st was the release of *Barbie* (Gerwig, USA) and *Oppenheimer* (Nolan, USA), which has since become immortalised as 'Barbenheimer'. The two titles received months of hype and anticipation leading to their release, as not only were they two films from acclaimed filmmakers, but two films with completely juxtaposing themes and colour palettes. It became an extremely popular trend online particularly, as the hashtag #Barbenheimer achieved over forty million global interactions per day throughout July, with moviegoers posting memes and TikToks about the two contrasting films (Ramachandran, 2024). The trends continued into the film's release, where audiences were dressed for the occasion, from suits for *Oppenheimer* to all-pink outfits for *Barbie*, but what was more apparent was the popularity of the *Barbenheimer* double bill.

Following the opening weekend of both films, *Barbie* grossed £18.5 million at the UK box office, with *Oppenheimer* at second with £10.9 million. Ben Dalton notes that this was collectively the biggest weekend for the UK box office since before the pandemic's arrival, and it was certainly attributed to the generated hype, trends, and the double bill (2023). Both films had sold-out showings throughout its release day with audiences planning group viewings of the double bill with the special attire worn. It again strikes similarities with trends observed in the Conclusion with the releases of *Spider-Man: No Way Home* and *Minions: The Rise of Gru* and suggest that moments, which invite audiences to overtly participate, are encouraging visits to the cinema, as people have a desire to be included and feel a part of a collective viewing experience. As a result of the success of both of these films, studios could see the potential in artificially creating a double bill of two titles releasing on the

same weekend, in order to heighten public interest and awareness and ultimately boost their revenues.

Furthermore, *Barbie* is based on the fashion dolls by Mattel and *Oppenheimer* is a biopic on theoretical physicist J. Robert Oppenheimer, and yet the success of the two films calls into question the speculation of the thesis that the future of the industry would be geared towards pre-existing franchises and cinematic universes. Instead, studios might slow down their slates to focus on maximising the potential of an individual film, rather than a commercial property, through the use of storytelling, maximalist tropes, and technical formats, like IMAX, to craft a movie that offers something more. While home viewings still remain, using the aesthetic of the cinema to amplify the subject matter of a film can be a tool to entice audiences to visit.

Ultimately, through the presence of social media and online trends, films are elevated from standalone viewings to cultural moments and events that audiences want to collectively participate in and be a part of. Moreover, as the future of the film industry will undoubtedly continue to develop, and be influenced by new and emerging technological introductions, having a reason for audiences to want to visit the cinema is a way that can help protect the longevity of the movie theatre going forward.

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Filmography and TV Titles

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- *2001: A Space Odyssey* (1968). Directed by Stanley Kubrick [Film]. USA: Metro-Goldwyn-Mayer.
- *65* (2023). Directed by Scott Beck and Bryan Woods [Film]. USA: Columbia Pictures.
- *9 to 5* (1980). Directed by Colin Higgins [Film]. USA: 20th Century Fox.
- *Africa: The Serengeti* (1994). Directed by George Casey [Documentary Film]. USA: Graphic Films.
- *Agent Carter* (2015-2016). Created by Christopher Markus and Stephen McFeely [TV Series]. USA: ABC Studios.
- *Agents of SHIELD* (2013-2020). Created by Joss Whedon, Jed Whedon and Maurissa Tancharoen [TV Series]. USA: ABC Studios.
- *Alvin and the Chipmunks: The Squeakquel* (2009). Directed by Betty Thomas [Film]. USA: 20th Century Fox.
- *The Ant Bully* (2006). Directed by John A. Davis [Film]. USA: Warner Bros. Pictures.
- *Ant-Man and the Wasp: Quantumania* (2023). Directed by Peyton Reed [Film]. USA: Marvel Studios.
- *Apollo 13* (1995). Directed by Ron Howard [Film]. USA: Universal Pictures.
- *Arrival of a Train at La Ciotat Station* (1895). Directed by Auguste Lumière and Louis Lumière. France: Lumière.
- *Artemis Fowl* (2020). Directed by Kenneth Branagh [Film]. USA: Walt Disney Pictures.
- *All Quiet on the Western Front* (1930). Directed by Lewis Milestone [Film]. USA: Universal Pictures.
- *Avatar* (2009). Directed by James Cameron [Film]. USA: 20th Century Fox.
- *Avatar: The Way of Water* (2022). Directed by James Cameron [Film]. USA: 20th Century Studios.
- *The Avengers* (2012). Directed by Joss Whedon [Film]. USA: Marvel Studios.
- *Avengers: Endgame* (2019). Directed by The Russo Brothers [Film]. USA: Marvel Studios.
- *Avengers Infinity War* (2018). Directed by The Russo Brothers [Film]. USA: Marvel Studios
- *Bambi* (1942). Directed by David Hand [Film]. USA: Walt Disney Productions.
- *Barbie* (2023). Directed by Greta Gerwig [Film]. USA: Warner Bros. Pictures.
- *The Battle of Ancre* (1917). Shot by Geoffrey Malins [Documentary Film]. UK: British Topical Committee for War Films.

- *The Battle of the Somme* (1916). Shot by Geoffrey Malins [Documentary Film]. UK: British Topical Committee for War Films.
- *Beasts of No Nation* (2015). Directed by Cary Fukunaga [Film]. USA: Netflix.
- *Ben-Hur* (1959). Directed by William Wyler [Film]. USA: Metro-Goldwyn-Mayer.
- *Beowulf* (2007). Directed by Robert Zemeckis [Film]. USA: Paramount Pictures.
- *The Big Fisherman* (1959). Directed by Frank Borzage [Film]. USA: Buena Vista Distribution.
- *The Big Parade* (1925). Directed by King Vidor [Film]. USA: Metro-Goldwyn-Mayer.
- *The Birth of a Nation* (1915). Directed by D.W. Griffith [Film]. USA: Epoch Producing Co.
- *Black Widow* (2021). Directed by Cate Shortland [Film]. USA: Marvel Studios.
- *Blue Planet* (1990). Directed by Ben Burt [Film]. USA: IMAX Space Ltd.
- *Breaking Bad* (2018-2013). Created by Vince Gilligan [TV Series]. USA: Sony Pictures Television.
- *Bright* (2017). Directed by David Ayer [Film]. USA: Netflix.
- *Bubble* (2005). Directed by Steven Soderbergh [Film]. USA: Magnolia Pictures.
- *Calm with Horses* (2019). Directed by Nick Rowland [Film]. Ireland: Film4 Productions.
- *Champions* (2023). Directed by Bobby Farrelly [Film]. USA: Focus Features.
- *Cinderella* (1950). Directed by Wilfred Jackson et al. [Film]. USA: Walt Disney Productions.
- *Chicken Little* (2005). Directed by Mark Dindal [Film]. USA: Walt Disney Pictures.
- *Close* (2022). Directed by Lukas Dhont [Film]. Belgium: Menuet.
- *CODA* (2021). Directed by Sian Heder [Film]. USA: Apple Studios.
- *The Conjuring: The Devil Made Me Do It* (2021). Directed by Michael Chaves [Film]. USA: Warner Bros. Pictures.
- *Creed III* (2023). Directed by Michael B. Jordan [Film]. USA: Metro-Goldwyn-Mayer.
- *Cruella* (2021). Directed by Craig Gillespie [Film]. USA: Walt Disney Studios.
- *Cry Macho* (2021). Directed by Clint Eastwood [Film]. USA: Warner Bros. Pictures.
- *Daredevil* (2015-2018). Created by Drew Goddard [TV Series]. USA: Netflix.
- *The Dark Knight* (2008). Directed by Christopher Nolan [Film]. USA: Warner Bros. Pictures.
- *The Defenders* (2017). Created by Douglas Petrie and Marco Ramirez [TV Series]. USA: Netflix.
- *The Divergent Series* (2014-2016). [Film Series]. USA: Summit Entertainment.
- *The Divergent Series: Allegiant* (2016). Directed by Robert Schwentke [Film]. USA: Summit Entertainment.
- *The Donna Reed Show* (1958-1964). Produced by Tony Owen and William S. Roberts [TV Series]. USA: Screen Gems.

- *Dr. Wise on Influenza* (1919). Directed by Joseph Best [Public Information Filler]. UK.
- *Dreamland* (2019). Directed by Miles Joris-Perafitte [Film]. USA: Vertical Entertainment.
- *Dune [Part One]* (2021). Directed by Denis Villeneuve [Film]. USA: Warner Bros. Pictures.
- *E.T. The Extra-Terrestrial* (1982). Directed by Steven Spielberg [Film]. USA: Universal Pictures.
- *Earthquake* (1974). Directed by Mark Robson [Film]. USA: Universal Pictures.
- *Elvis* (2022). Directed by Baz Luhrmann [Film]. USA: Warner Bros. Pictures.
- *Emma* (2020). Directed by Autumn de Wilde [Film]. UK: Focus Features.
- *Enola Holmes* (2020). Directed by Harry Bradbeer [Film]. UK: Legendary Pictures.
- *Erin Brockovich* (2000). Directed by Steven Soderbergh [Film]. USA: Universal Pictures.
- *Everything Everywhere All at Once* (2022). Directed by The Daniels [Film]. USA: A24.
- *F9* (2021). Directed by Justin Lin [Film]. USA: Universal Pictures.
- *Fantasia* (1940). Directed by Samuel Armstrong et al. [Film]. USA: Walt Disney Productions.
- *Fast X* (2023). Directed by Louis Leterrier [Film]. USA: Universal Pictures.
- *The Fear Street Trilogy* (2021). Directed by Leigh Janiak [Film Series]. USA: Netflix.
- *The Flash* (2023). Directed by Andy Muschietti [Film]. USA: Warner Bros. Pictures.
- *Friends* (1994-2004). Created by David Crane and Marta Kauffman [TV Series]. USA: Warner Bros. Studios.
- *Frozen 2* (2019). Directed by Chris Buck and Jennifer Lee [Film]. USA: Walt Disney Pictures.
- *Full Frontal* (2002). Directed by Steven Soderbergh [Film]. USA: Miramax Films.
- *Game of Thrones* (2011-2019). Created by David Benioff and D.B. Weiss [TV Series]. USA: HBO Entertainment.
- *Get Lost in Great Stories* (2020). Directed by Jake Scott [Advert]. UK: RSA Films.
- *Ghostbusters: Afterlife* (2021). Directed by Jason Reitman [Film]. USA: Columbia Pictures.
- *Glass Onion: A Knives Out Mystery* (2022). Directed by Rian Johnson [Film]. USA: Netflix.
- *The Godfather* (1972). Directed by Francis Ford Coppola [Film]. USA: Paramount Pictures.
- *The Godfather Part II* (1974). Directed by Francis Ford Coppola [Film]. USA: Paramount Pictures.
- *Godzilla vs. Kong* (2021). Directed by Adam Wingard [Film]. USA: Legendary Pictures.
- *Gone with the Wind* (1939). Directed by Victor Fleming [Film]. USA: Metro-Goldwyn-Meyer.
- *Gravity* (2013). Directed by Alfonso Cuarón [Film]. USA: Warner Bros.
- *Greyhound* (2020). Directed by Adam Schneider [Film]. USA: Apple Studios.
- *Guardians of the Galaxy Vol. 3* (2023). Directed by James Gunn [Film]. USA: Marvel Studios.
- *Hannah Montana* (2006-2011). Created by Michael Poryes et al [TV Show]. USA: Disney.

- *Harry Potter and the Deathly Hallows – Part 1* (2010). Directed by David Yates [Film]. UK: Warner Bros. Pictures.
- *Harry Potter and the Deathly Hallows – Part 2* (2011). Directed by David Yates [Film]. UK: Warner Bros. Pictures.
- *The Hateful Eight* (2015). Directed by Quentin Tarantino [Film]. USA: The Weinstein Company.
- *Hearts of the World* (1918). Directed by D.W. Griffith [Film]. USA: Paramount Pictures.
- *The Hobbit* (2012-2014). Directed by Peter Jackson [Film Series] New Zealand: New Line Cinema.
- *Host* (2020). Directed by Rob Savage [Film]. UK: Vertigo Releasing.
- *Hot Ones* (2015-). Created by Christopher Schonberger and Sean Evans [Online Show]. USA: Complex Media.
- *House of Wax* (1953). Directed by Andre DeToth [Film]. USA: Warner Bros.
- *Hugo* (2011). Directed by Marin Scorsese [Film]. USA: Paramount Pictures.
- *The Hunger Games* (2012-2015). [Film Series]. USA: Color Force.
- *The Hunt* (2020). Directed by Craig Zobel [Film]. USA: Universal Pictures.
- *Indiana Jones and the Dial of Destiny* (2023). Directed by James Mangold [Film]. USA: Walt Disney Pictures.
- *The Invisible Man* (2020). Directed by Leigh Whannell [Film]. USA: Universal Pictures.
- *The Irishman* (2019). Directed by Martin Scorsese [Film]. USA: Netflix.
- *Iron Man* (2008). Directed by Jon Favreau [Film]. USA: Marvel Studios.
- *James Bond* (1962-). [Film Series]. UK: Eon Productions.
- *Jaws* (1975). Directed by Steven Spielberg [Film]. USA: Universal Pictures.
- *Jaws 2* (1978). Directed by Jeannot Szwarc [Film]. USA: Universal Pictures.
- *The Jazz Singer* (1927). Directed by Crosland [Film]. USA: Warner Bros. Pictures.
- *Jessica Jones* (2015-2019). Created by Melissa Rosenberg [TV Series]. USA: Netflix.
- *Jigsaw* (2017). Directed by The Spierig Brothers [Film]. USA: Lionsgate Films.
- *Jungle Cruise* (2021). Directed by Jaume Collet-Serra [Film]. USA: Walt Disney Pictures.
- *Jurassic Park* (1993). Directed by Steven Spielberg [Film]. USA: Amblin Entertainment.
- *Jurassic World: Fallen Kingdom* (2018). Directed by J.A. Bayona [Film]. USA: Amblin Entertainment.
- *King Richard* (2021). Directed by Reinaldo Marcus Green [Film]. USA: Warner Bros. Pictures.
- *The King Visits his Armies in the Great Advance* (1916). Shot by Geoffrey Malins [Documentary Film]. UK: British Topical Committee for War Films.

- *Knives Out* (2019). Directed by Rian Johnson [Film]. USA: Lionsgate.
- *Lady and the Tramp* (2019). Directed by Charlie Bean [Film]. USA: Walt Disney Pictures.
- *The Little Mermaid* (2023). Directed by Rob Marshall [Film]. USA: Walt Disney Pictures.
- *Locked Down* (2021). Directed by Doug Liman [Film]. USA: Warner Bros. Pictures.
- *The Lord of the Rings* (2001-2003). Directed by Peter Jackson [Film Series]. New Zealand: New Line Cinema.
- *Malcolm & Marie* (2021). Directed by Sam Levinson [Film]. USA: Netflix.
- *The Mandalorian* (2019-). Created by Jon Favreau [TV Show]. USA: Lucasfilm.
- *Mank* (2020). Directed by David Fincher [Film]. USA: Netflix.
- *Marvel Cinematic Universe, MCU* (2008-). [Film Series]. USA: Marvel Studios.
- *The Matrix* (1999). Directed by The Wachowskis [Film]. USA: Warner Bros. Pictures.
- *The Matrix Reloaded* (2003). Directed by The Wachowskis [Film]. USA: Warner Bros. Pictures.
- *The Matrix Revolutions* (2003). Directed by The Wachowskis [Film]. USA: Warner Bros. Pictures.
- *The Meyerowitz Stories (New and Selected)* (2017). Directed by Noah Baumbach [Film]. USA: Netflix.
- *Minions: The Rise of Gru* (2022). Directed by Kyle Balda [Film]. USA: Illumination.
- *Mission: Impossible – Dead Reckoning – Part One* (2023). Directed by Christopher McQuarrie [Film]. USA: Paramount Pictures.
- *Mulan* (2020). Directed by Niki Caro [Film]. USA: Walt Disney Pictures.
- *Murder Mystery* (2019). Directed by Kyle Newacheck [Film]. USA: Netflix.
- *No Time to Die* (2021). Directed by Cary Joji Fukunaga [Film]. UK: Metro-Goldwyn-Mayer.
- *Noelle* (2019). Directed by Marc Lawrence [Film]. USA: Walt Disney Pictures.
- *Nomadland* (2020). Directed by Chloe Zhao [Film]. USA: Searchlight Pictures.
- *Okja* (2017). Directed by Bong Joon-ho [Film]. USA: Netflix.
- *Open Season* (2006). Directed by Roger Allers and Jill Culton [Film]. USA: Sony Pictures Animation.
- *Oppenheimer* (2023). Directed by Christopher Nolan [Film]. USA: Universal Pictures.
- *Parasite* (2019). Directed by Bong Joon-ho [Film]. South Korea: CJ Entertainment.
- *Pearl* (2022). Directed by Ti West [Film]. USA: A24.
- *Peter Rabbit 2* (2021). Directed by Will Gluck [Film]. USA: Columbia Pictures.
- *Pokémon: Detective Pikachu* (2019). Directed by Rob Letterman [Film]. USA: Legendary Pictures.

- *Porgy and Bess* (1959). Directed by Otto Preminger [Film]. USA: Columbia Pictures.
- *Portrait of a Lady on Fire* (2019). Directed by Celine Sciamma [Film]. France: Lilies Films.
- *Promising Young Woman* (2020). Directed by Emerald Fennell [Film]. USA: Focus Features.
- *Raya and the Last Dragon* (2021). Directed by Carlos Lopez Estrada and Don Hall [Film]. USA: Walt Disney Pictures.
- *Red Notice* (2021). Directed by Rawson Marshall Thurber [Film]. USA: Netflix.
- *Roma* (2018). Directed by Alfonso Cuarón [Film]. Mexico: Netflix.
- *RRR* (2022). Directed by S.S. Rajamouli [Film]. India: DVV Entertainment.
- *Scout's Guide to the Zombie Apocalypse* (2015). Directed by Christopher Langdon [Film]. USA: Paramount Pictures.
- *The Simpsons* (1989-). Created by Matt Groening [TV Series]. USA: 20th Television.
- *The Secret Garden* (2020). Directed by Marc Munden [Film]. UK: StudioCanal.
- *Shang-Chi and the Legend of the Ten Rings* (2021). Directed by Destin Daniel Cretton [Film]. USA: Marvel Studios.
- *Skyfall* (2012). Directed by Sam Mendes [Film]. UK: Metro-Goldwyn-Mayer.
- *Snow White and the Seven Dwarfs* (1937). Directed by David Hand et al. [Film]. USA: Walt Disney Productions.
- *Songbird* (2020). Directed by Adam Mason [Film]. USA: STX Films.
- *Sonic the Hedgehog* (2020). Directed by Jeff Fowler [Film]. USA: Paramount Pictures.
- *Soul* (2020). Directed by Pete Doctor [Film]. USA: Pixar Animation Studios.
- *The Sound of Music* (1965). Directed by Robert Wise [Film]. USA: 20th Century Fox.
- *Spartacus* (1960). Directed by Stanley Kubrick [Film]. USA: Universal International.
- *Spectre* (2015). Directed by Sam Mendes [Film]. UK: Metro-Goldwyn-Mayer.
- *Spider-Man* (2002). Directed by Sam Raimi [Film]. USA: Columbia Pictures.
- *Spider-Man: Across the Spider-Verse* (2023). Directed by Joaquim Dos Santos et al. [Film]. USA: Sony Pictures Animation.
- *Spider-Man: No Way Home* (2021). Directed by Jon Watts [Film]. USA: Marvel Studios.
- *Spiral* (2021). Directed by Darren Lynn Bousman [Film]. USA: Lionsgate.
- *Squid Game* (2021-). Created by Hwang Dong-hyuk [TV Series]. South Korea: Netflix.
- *Star Wars* (1977-). [Film Series]. USA: Lucasfilm.
- *Star Wars: Episode I – The Phantom Menace* (1999). Directed by George Lucas [Film]. USA: Lucasfilm Ltd.
- *Star Wars: Episode II – Attack of the Clones* (2002). Directed by George Lucas [Film]. USA: Lucasfilm Ltd.

- *Star Wars [Episode IV – A New Hope]* (1977). Directed by George Lucas [Film]. USA: Lucasfilm Ltd.
- *Star Wars: Episode IV – A New Hope* (1977). Directed by George Lucas. USA: Lucasfilm.
- *Star Wars: Episode V – The Empire Strikes Back* (1980). Directed by Irvin Kershner. USA: Lucasfilm.
- *The Ten Commandments* (1956). Directed by Cecil B. DeMille [Film]. USA: Paramount Pictures.
- *Tenet* (2020). Directed by Christopher Nolan [Film]. USA: Warner Bros. Pictures.
- *Terminator* (1984-2019). [Film Series]. USA: StudioCanal.
- *Terminator: Dark Fate* (2019). Directed by Tim Miller [Film]. USA: Paramount Pictures.
- *Terminator Salvation* (2009). Directed by McG [Film]. USA: Columbia Pictures.
- *Terminator 2: Judgement Day* (1991). Directed by James Cameron [Film]. USA: Tri-Star Pictures.
- *Those Who Wish Me Dead* (2021). Directed by Taylor Sheridan [Film]. USA: Warner Bros. Pictures.
- *Titanic* (1997). Directed by James Cameron [Film]. USA: Paramount Pictures.
- *Top Gun: Maverick* (2022). Directed by Joseph Kosinski [Film]. USA: Paramount Pictures.
- *Toy Story* (1995). Directed by John Lasseter [Film]. USA: Pixar Animation Studios.
- *Transformers: Rise of the Beast* (2023). Directed by Steven Caple Jr. [Film]. USA: Paramount Pictures.
- *The Trial of the Chicago 7* (2020). Directed by Aaron Sorkin [Film]. USA: Netflix.
- *Trolls* (2016). Directed by Mike Mitchell [Film]. USA: DreamWorks Animation.
- *Trolls: World Tour* (2020). Directed by Walt Dohm [Film]. USA: DreamWorks Animation.
- *The Twilight Saga* (2008-2012). [Film Series]. USA: Summit Entertainment.
- *Twin Peaks: The Return* (2017). Created by David Lynch and Mark Frost [TV Series]. USA: Showtime.
- *U2 3D* (2008). Directed by Catherine Owens and Mark Pellington [Film]. USA: 3ality Digital.
- *Unhinged* (2020). Directed by Derrick Borte [Film]. USA: Solstice Studios.
- *The Unholy* (2021). Directed by Evan Spiliotopoulos [Film]. USA: Sony Pictures Releasing.
- *Unsane* (2018). Directed by Steven Soderbergh [Film]. USA: Regency Enterprises.
- *Venom: Let There Be Carnage* (2021). Directed by Andy Serkis [Film]. USA: Columbia Pictures.
- *Vertigo* (1958). Directed by Alfred Hitchcock [Film]. USA: Paramount Pictures.
- *WandaVision* (2021). Created by Jac Shaeffer [TV Series]. USA: Marvel Studios.

- *War Neuroses Netley, 1917* (1917). Directed by Arthur Hurst [Documentary Film]. UK: British Pathé.
- *What's Love Got to Do with It?* (2022). Directed by Shekhar Kapur [Film]. UK: Working Title Films.
- *The Wizard of Oz* (1939). Directed by Victor Fleming [Film]. USA: Metro-Goldwyn-Mayer.
- *We Make Movies Better, AMC Theatres* (2021) Directed by Jeff Cronenweth [Advert]. USA: Wondros.
- *Westworld* (1973). Directed by Michael Crichton [Film]. USA: Metro-Goldwyn-Mayer.
- *Wild Rose* (2018). Directed by Tom Harper [Film]. UK: Entertainment One.
- *Wonder Woman 1984* (2020). Directed by Patty Jenkins [Film]. USA: Warner Bros. Pictures.
- *Workers Leaving the Lumière Factory* (1895). Directed by Louis Lumière [Film]. France: Lumière.